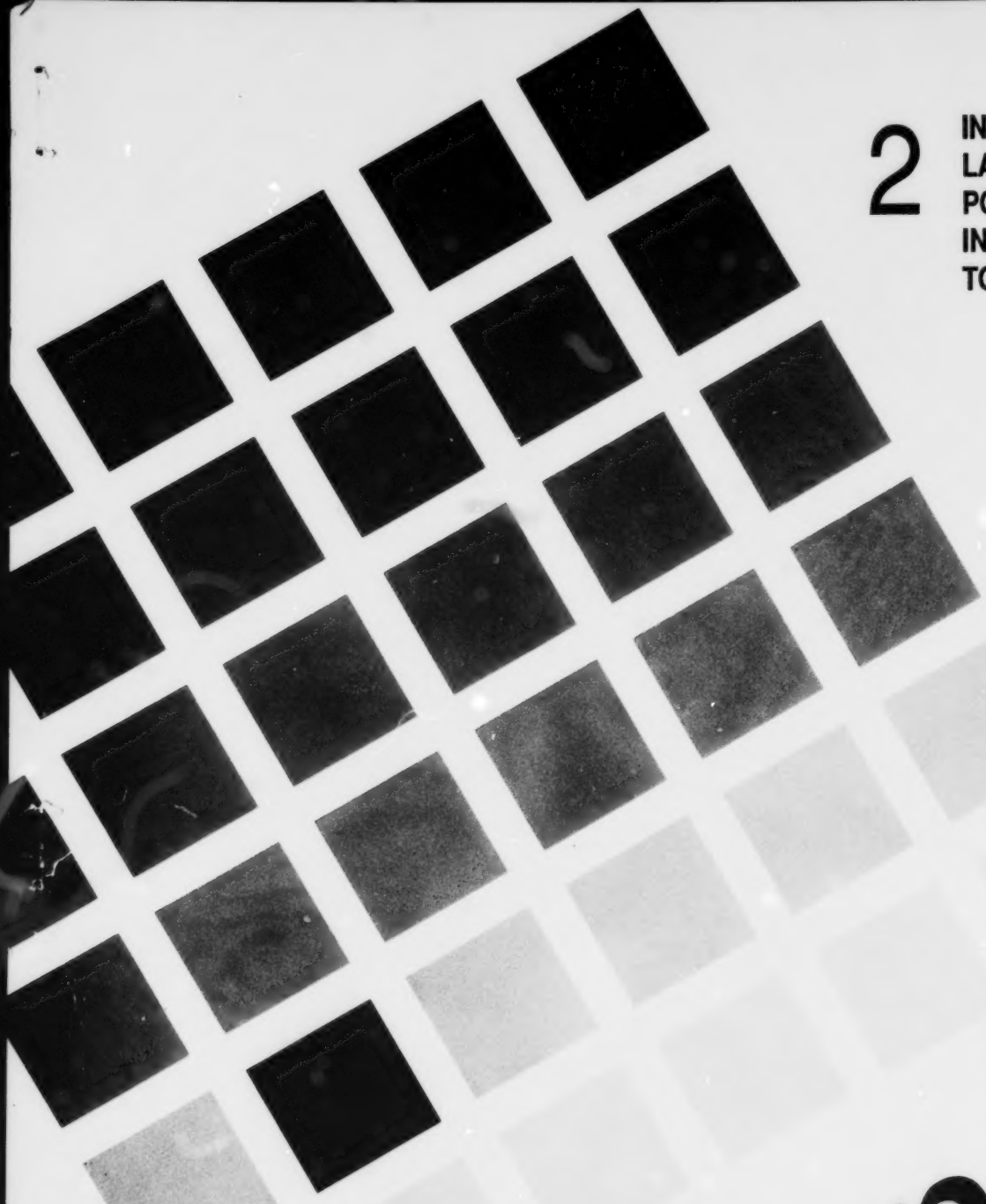


2 INDUSTRIAL LAND USE POLICY IN TORONTO

Cityplan '91

City of Toronto
Planning & Development Department

Robert E. Millward
Commissioner

2

INDUSTRIAL LAND USE POLICY IN TORONTO

May 26, 1989

This Report from the Commissioner of Planning & Development was adopted by Land Use Committee on July 5, 1989.

$ 5.00

For further information please contact Mr. Ed Mihalcin, Policy and Strategic Planning Division, City of Toronto Planning and Development Department at 392-7977

90-02213/

Contents

1.	**Introduction**		**1**
	1.1	Overview	1
	1.2	Background	2
2.	**Existing Industrial Policy**		**3**
	2.1	Official Plan Policy	3
	2.2	Industrial Zoning	4
	2.3	Policy Context	4
	2.4	Economic Development Strategy	8
	2.5	Toronto: Still a Place of Industry	9
3.	**Industrial Activity in the City of Toronto**		**11**
	3.1	Introduction	11
	3.2	Definition of Industry and Databases	11
	3.3	City-Wide Industrial Trends	12
	3.4	Character of the City's Industrial Areas	18
	3.5	Summary	24
4.	**Economic Trends**		**27**
	4.1	Introduction	27
	4.2	The Changing Metropolican Economy, Metropolitan Plan Review, 1986	28
	4.3	Industrial Areas, Metropolitan Plan Review, 1988	28
	4.4	U.S. - Canada Free Trade Agreement, Planning and Development Department, May 25, 1988	30
	4.5	Summary	32
5.	**Conclusions and Recommendations**		**35**
	5.1	Conclusions	35
	5.2	Further Studies	38
	5.3	Recommendations	39
	Appendices		**41**

Tables

Table 1	Employment by Sector, City of Toronto, 1983-1988	14
Table 2	Full Time Employment by Sector, City of Toronto, 1983-1988	15
Table 3	No. of Establishments by Sector, City of Toronto, 1983-1988	16
Table 4	Metropolitan Toronto and City of Toronto Employment, 1987	17
Table 5	Ranking of Industrial Areas By Total Acreage	22
Table 6	Employment by Sector for 19 Industrial Areas, 1983 and 1988	23
Table 7	Employment by Industrial Area, 1983 and 1988	24

Charts

Chart 1	Existing Zoning Categories	5
Chart 2	Relationship of Zoning Categories and Official Plan Designations	6

Maps

Map 1	Industrial Districts & Areas	18
Map 2	Industrial Areas in Metropolitan Toronto	29

1

Introduction

1.1 Overview

Toronto's industrial areas represent a major element of the City's urban and economic structure. There is, however, severe pressure to redesignate many of these lands for residential and/or commercial uses, particularly through the mechanism of site specific Official Plan Amendments. The long term ramifications of such redesignation include:

a) significant loss of industrial employment,

b) diminished economic and social diversity, and

c) eliminating opportunities to accommodate future types of industrial uses.

Protecting industrial areas and industrial employment is greatly influenced by existing industrial policies in the City of Toronto. Are these policies still effective and relevant? To assist in these deliberations, industrial policies are evaluated in the context of:

a) recent industrial activity in the City of Toronto;

b) postulated future economic trends in the national, provincial and local economy; and

c) changes in the structure of industry within Metropolitan Toronto and the Region.

The report concludes with a proposed future direction for a coordinated industrial land use strategy. In addition to this report and reports pertaining to economic development, other work directly related to the City's industrial policy is also currently underway, including:

a) the live/work space crisis affecting Toronto's artists;

b) the possibility of zoning by housing tenure (ownership, private rental and/or non-profit housing) in certain circumstances rather than the broad category of "Residential Use"; and

c) Official Plan environmental policies.

1.2 Background

On April 21, 1987, City Council adopted the 1986 Quinquennial Review Overview Report and Background Papers in fulfillment of the following requirements (L.U.C., R. No. 9, Cl. 19):

1. The Part I Plan for the Central Area put in place provisions which require reviews at five year intervals of certain aspects of the plan.
2. Section 26 of the Planning Act requires that, at least every five years, municipal councils consider whether or not an existing Official Plan requires revision.

By adopting the 1986 Quinquennial reports City Council also endorsed a comprehensive work program necessary for a major review of the City's Official Plan in 1991. This report on the City's industrial policy is part of the 1991 Official Plan review, and was one of the studies recommended in the 1986 Quinquennial Review. As explained on page 106 of the 1986 Quinquennial Review Overview Report:

> *"A review of the industrial strategy is required to respond to changes that have occured since the adoption of the industrial policy and the Selective Economic Development Strategy. This review will focus not only on trends in the larger economy, including the City, but will build upon the strengths of the existing industrial districts on the basis of area studies."*

2

Existing Industrial Policy

2.1 Official Plan Policy

The City's existing industrial policy was incorporated as Section 4 of the Official Plan in 1978. Three new exclusive industrial land-use designations and two mixed-use designations replaced the "Area of Industry" designation of the 1969 Official Plan. The five land-use designations can be broadly defined as follows:

- Restricted Industrial Areas contain a limited range of industrial uses which are environmentally compatible with adjacent residential or commercial uses.
- General Industrial Areas contain a wide range of industrial uses except those which may have a detrimental environmental impact on other industrial uses.
- Heavy Industrial Areas contain a full range of industrial uses and are not located in proximity to residential or commercial areas.
- Mixed Industrial-Residential Areas contain a mix of a wide range of residential uses, community services and facilities, street-related retail and service uses, and those industrial uses which are environmentally compatible with adjacent neighbouring uses.
- General Use Areas contain a mix of commercial, institutional and industrial uses, which are environmentally compatible with adjacent and neighbouring uses.

Essentially, the three exclusive industrial designations are based on the differing degree of environmental impact on adjacent areas of the various types of industrial firms. Differences between the mixed-use designations are self explanatory.

The critical objective in establishing these designations was to encourage the consolidation of industrial uses into areas deemed viable for continued industrial use. Such consolidation ensures that conflicts among uses are minimized and that areas reserved for industrial activity will continue to attract industry. The five general criteria for determining viable industrial areas are:

a) existing concentrations of industrial firms,

b) existing stock of industrial buildings,

c) labour accessibility,

d) transportation of goods; and

e) local considerations.

2.2 Industrial Zoning

Before the introduction of the new Official Plan designations referred to above, the City of Toronto Zoning By-law did not separate industrial and commercial uses, but grouped them together within C1, C2, C3, and C4 Zoning districts. These districts were cumulative, which meant that uses permitted in each successive district incorporated the uses permitted in the previous C districts. Thus, while industrial uses were permitted in C2, C3 and C4 districts, allowing increasingly "heavier" industries, C1 commercial and retail uses were also permitted in all of the C districts.

As a consequence of creating the 1978 Official Plan industrial designations, three of which allowed only industrial uses, five new industrial zoning categories were implemented. Four are exclusively industrial and one is mixed industrial-commercial. For a description of the zoning categories, and their relation to 1978 Official Plan industrial policies, refer to accompanying charts 1 and 2.

2.3 Policy Context

At the time these policies were formulated, industrial employment in the City had been declining since 1950. In 1950 there were 113,000 manufacturing workers in the City, whereas by 1975 the number had decreased to 60,000. Over the same time period, the number of manufacturing jobs in the rest of Metropolitan Toronto had increased dramatically, from 27,160 to over 250,000. (Source: See Industrial Policy and the Central Industrial District, City of Toronto Planning Board, February, 1978, page 15.)

Chart 1
Existing Zoning Categories

	Application to Official Plan Designations	Permits	Excludes
I1	Industrial uses in mixed industrial -residential areas Portions of restricted industrial areas depending on local conditions	Uses compatible with adjacent residential uses	Uses that may generate a high level of traffic or produce objectional emissions such as odours or noise
I2	Restricted Industrial Areas Portions of general industrial areas depending on local conditions	Uses compatible with adjacent residential and/ or commercial areas	Uses capable of producing adverse environmental effects in adjacent non-industrial areas
I3	General Industrial Areas Segregated industrial areas by means ofa rezoning	Industrial uses which are mutually compatible	Uses that are potentially incompatible with industrial uses by virtue of noise, appearance, emissions or danger
I4	Heavy Industrial Areas General industrial areas on site-by-site basis for existing uses	Potentially incompatible uses	Potentially incompatible uses not already located in the City or which do not require a city location; slaughter houses, stockyards and poultry-killing establishments except on site-by-site bases after local study
IC	General Use Areas Mixed industrial-commercial areas (introduced through Part II Plans)	Commercial uses and those industrial uses which are compatible with commercial uses	Uses which produce objectional emissions such as noise or or odour or which would otherwise adversely effect commercial uses

Chart 2
Relationship of Zoning Categories and Official Plan Designations

Official Plan Designation	Zoning Applicable Categories
Mixed Industrial-Residential:	I1 I2 Depending on local conditions
Restricted Industrial:	I2 I1 or I3 Depending on local conditions
General Industrial:	I3 I2 Depending on local conditions I4 On site specific basis for existing uses
Heavy Industrial:	I4 I3
General Use:	IC or I2 depending on local conditions

The suburbanization of industrial employment represented a serious concern to the City for a number of reasons:

1. Social Polarisation

The exodus of industrial firms from the City was resulting in a serious reduction in blue collar employment opportunities and consequently, in the diversity of socio-economic groups who were able to use the City as a place of work. As a result, many low skilled workers moved out of the City in pursuit of a nearby industrial workplace, while white collar workers initiated rapid gentrification of the City's working class neighbourhoods for basically the same reasons. New ways of characterizing the City such as the "Executive City" began to emerge.

2. Unemployment

The relocation of industrial firms out of the City was creating hardships for many City-resident employees. In extreme cases, some industries relocated well out of the Metropolitan Region and permanently laid off their existing work force. Resultant unemployment was particularly difficult for the older employee with few job skills. Other employees who eventually found re-employment, often suffered economic, psychological and health losses.

3. Service Sector Employment

A predominant assumption at the time was that growth in service sector employment was compensating for the decline in industrial employment. While no data were available to test this assumption, planners argued that the clear differences between industrial employment and white-collar employment meant that the service sector, even if it managed to provide employment for displaced industrial workers, was often a poor substitute. Average wages were higher in manufacturing than in services, the proportion of very low wage jobs was smaller, income equality was greater and benefits such as health insurance, vacation days, and sick leave were higher and more widely available. **See A Place for Industry, City of Toronto Planning Board, June 1978.

The City of Toronto industrial land use policy discussed in Sections 2.1 and 2.2 was implemented in 1978 in response to the above social concerns. To stem the tide of the continued loss of industrial firms, viable industrial areas determined by site specific study were designated for exclusive industrial use. By clearly defining the industrial districts, land-use conflicts between industry and other uses would be mitigated, thereby enhancing the industrial operations of firms in those areas. It was argued that by designating such lands exclusively for industry, industrial land uses would become more stable. Commercial uses which could outbid industrial uses for the limited supply of industrial land, would be prohibited in industrial areas.

It is also important to note that the 1978 City industrial policy was formulated in the context of emerging policies regarding housing, retail strips and office development. The complementary relationship of the City's industrial land use policies and policies governing other major land-uses are discussed below:

a) Office Development

The 1976 Official Plan amendments for the Central Area imposed limits on the growth of office space in the centre of Toronto and established a mechanism for assessing the pace of office development which took the form of review limits for office floor space in the Central Core for the years 1981, 1986 and 1991. The Central Area Plan recognized the City's Financial District as the major priority area for new office development and those districts designated as High Density, Mixed Commercial-Residential areas as second priority.

Consistent with this office policy, office development in industrial areas outside the Central Core was prohibited or at a minimum, severely restricted. This was not the situation under the previous C industrial zoning categories.

b) Retail

Retail policies developed during the late 1970's and early 1980's recognize the importance of local retail strips along various arterials in the City. Unlike large centralized shopping

centres, retail strips encourage pedestrian activity and the growth of small businesses. In addition, the policy recognized that by protecting retail strips, a diversity of shopping opportunities would be available to City residents.

Again, consistent with this retail policy, most retail uses were prohibited in the City's industrial areas. Before the 1978 industrial policy, large scale retail uses such as superstores or shopping centres often located in industrial areas contributing to the decline of nearby retail strips.

c) Housing

The primary housing goals of Council are:

- the provision of decent housing to all residents in a suitable living environment at prices which they can afford;
- the equitable distribution of housing to meet the needs of identified target income groups;
- the preservation and improvement of existing housing and existing residence areas; and
- the provision of housing which is acceptable to and meets the needs of the handicapped and the elderly.

By reducing the land area designated for industry, through the preparation of Part II plans based on the 1978 industrial policy, the City's housing policy was complemented as follows:

(i) freeing up non-viable industrial land for housing, and

(ii) consolidating industrial activities into areas considered viable for industry thus mitigating negative land-use impacts often associated with housing and industry in close proximity to one another.

2.4 Economic Development Strategy

In addition to land-use policy, the City's industrial policy is also comprised of an economic development strategy as developed in a number of initiatives and reports over the last 15 years. Like the land-use policy, the goal of the economic development strategy is to support a diversified economic base to:

a) provide employment opportunities for a work force with widely varying skills; and

b) promote economic stability in the face of cyclical changes affecting particular sectors.

Some of the specific economic development initiatives pursued by the City to achieve the above goal are briefly described in a recent report by the Planning and Development Department entitled "Workplace Closings, the Free Trade Agreement and the City's Economic Development Strategy". These initiatives include the industrial liaison committees, the film liaison program, the small business self-help centre, the design exchange project, the Portland Fashion Centre and the Fashion Incubator project, retail support programs, community economic development initiatives and various international linkages related to the development of export and investment opportunities.

The common theme behind these initiatives is that each intervention has been targeted toward economic sectors which require encouragement from the City in order to achieve their potential in the future.

2.5 Toronto: Still a Place of Industry

It has been over ten years since City Council adopted the industrial policy outlined in the previous sections. In the intervening years much has transpired to occasion serious scrutiny, from a number of different perspectives of the policy, including: 1) awareness and concern respecting the environmental impact of some of the City's industries has grown; 2) the need for affordable housing has escalated to near crisis proportions, and 3) several major manufacturing plants have closed.

Together, these and other factors have contributed to a growing skepticism about the efficacy of the industrial policy with the result that speculation over whether industrial lands will or should be released for other purposes, particularly social housing, has also grown. It is therefore important at the outset, before reviewing the specific changes which have occurred in the City's industrial areas over the past decades, to clearly and simply set out why the City should continue to have and promote its industrial policy.

Economic diversity is a foundation not only for social health of a City, but for economic health. Economic diversity will contribute directly to the goal of ensuring that whole segments of society are not disenfranchised through the lack of job opportunities. The social costs of such disenfranchisement, as the experience of other cities has shown, can be very high. Economic diversity is also key to economic stability in the face of cyclical downturns in the economy. Finally, economic diversity maximizes opportunities for entrepreneurial growth, a key to new job creation and hence further, future economic growth.

Industry has had and continues to have a significant role to play in maintaining economic diversity and promoting social welfare. The following sections review the changes that have occurred in the City's industrial base over the last fifteen years.

3

Industrial Activity in the City of Toronto

3.1 Introduction

This chapter focuses on industrial activity in the City of Toronto during the 1980's. It begins with a discussion of industrial definitions and relevant data sources followed by a synopsis of City-wide industrial trends. The remainder of the chapter presents a profile of the various industrial districts and areas, outlining employment trends and land use character.

3.2 Definition of Industry and Databases

Industry as a land use has traditionally been defined to include only manufacturing, warehousing, utility and transportation related uses. Forces of change at work in the general economy have, however, required an expanded view of how industry is defined. Uses that are now considered appropriate for industrial areas in the City of Toronto Zoning By-law, in addition to those above, include newspaper plants, data processing centres, film and recording studios, radio and television broadcasting stations, artists' and photographers' studios, and wholesaling establishments.

An assessment of industrial employment trends in the City of Toronto therefore requires a database with a reasonably comprehensive definition of industry. Such a database, which is specific to City of Toronto industry, has recently been compiled by the Planning and Development Department. It contains firm and employment information organized by Canadian Standard Industrial Classification (SIC) codes which are grouped as follows:

Textile and Clothing
Communications
Printing and Publishing
Heavy Manufacturing
Food and Beverage
Light Manufacturing
Transportation
Wholesale
Construction
Automotive
Warehousing
Utilities and Post Office
Other

Unfortunately, this recently developed industrial database does not contain information on firms and employment before 1985. Information is available for 1985 and 1986, but only for some sectors. Detailed information is only available for 1987.

Because of the time series limitation, the City of Toronto Industrial Database could not be used in this report to assess industrial trends in the City during the 1980's.

What is used is the Metro Employment file, which is statistically compatible from 1983 onward. Before 1983, only full-time employment was available for all firms. After carefully reviewing this database, the following groups of codes were deemed to represent the closest match possible with the City of Toronto Zoning By-law.

Manufacturing	**Non-Manufacturing**
Food Processing	Photo & Graphics
Textiles, Leather	Data Processing
Metal Products	Film/Video/Audio
Chemicals	Radio/T.V. Stations
Furniture & Fixtures	Other Media
Machinery & Equipment	Newspaper Publishing
Electrical Equipment	Other Publishing
Printing	Transport Terminals
Postal Sorting Station	Business Equipment
Other Manufacturing	Lumber Yards
Warehousing	Wholesalers
Storage	Auto Repair/Service
Car Dealerships	
Car/Truck Rentals	

All subsequent City-wide and area-specific analyses are based on the above industrial classifications from the Metro Employment file.

3.3 City-Wide Industrial Trends

Tables 1 to 4 detail City-wide industrial trends since 1983. Overall industrial employment totals include all industrial employment in industrial areas plus industrial employment in such establishments as the CBC, Globe and Mail, Sears Warehouse building, Toronto Sun, etc.

These City-wide industrial trends can be summarized as follows:

- There has been a net increase of 3,900 industrial employees, representing a 4.2 per cent increase in total industrial employment.

- While overall industrial employment has increased, this has not been the case for the traditional manufacturing industrial sector. Within this sector, 7,700 jobs have been lost (14 per cent decline).
- Lost employment in traditional industry has been more than compensated by growth of non-manufacturing industries, particularly media and data processing.
- The largest industrial employment sectors are:

Industrial Sector	1988 Employment
Clothing	10,876
All media	10,442
Other Manufacturing	9,768
Publishing	9,182
Food Processing	8,335
Data Processing	7,653

- Before 1988, part-time industrial employment varied between 6% and 8% of total employment. In 1988, part-time employment comprised 10% of total industrial employment. This recent growth in part time employment is particularly pronounced in the manufacturing sector.
- The number of industrial establishments has remained relatively stable. Again a declining number of establishments in traditional industry has been balanced by a growth in the number of establishments in media, photo and graphics, and data processing.
- Approximately one-quarter of all Metropolitan Toronto industrial employment is within the City of Toronto. Sectors that comprise a high percentage of the Metropolitan Toronto market include:

Industrial Sector	Percentage of Metro Employment
Newspaper Publishing	89.7%
All Media	64.0% to 85.0%
Postal Sorting Station	73.0%
Photo and Graphics	65.0%
Clothing	55.7%
Storage	48.9%
Data Processing	48.7%
Other Publishing	46.6%

- A number of significant plant closings/relocations have been recently announced. These include Stelco, Maple Leaf Mills, Rowntree Mackintosh, Inglis and Molson's. Together, these represent a further erosion of 2,500 manufacturing jobs.

Table 1
Employment by Sector, City of Toronto, 1983-1988

Manufacturing*	**1983**	**1984**	**1985**	**1986**	**1987**	**1988**
Food Processing	10,155	10,013	10,437	10,741	8,165	8,335
Textiles, Leather	2,377	2,937	3,373	3,003	2,678	2,122
Metal Products	2,228	1,970	2,432	2,405	2,169	1,650
Chemicals	1,840	1,563	1,244	1,168	1,727	1,224
Clothing	12,496	13,498	13,326	12,082	12,574	10,876
Furniture & Fixtures	2,834	2,136	2,128	2,247	1,832	1,801
Machinery & Equip	1,707	1,350	1,259	914	463	853
Electrical Equip	3,149	3,460	2,734	1,841	1,523	1,402
Printing	3,501	3,613	4,221	3,748	3,101	2,895
Postal Sorting Stn	2,618	2,618	2,699	3,099	3,205	3,150
Other Manufacturing	9,282	7,671	8,449	8,059	7,997	9,768
Warehousing	2,283	2,321	2,836	2,997	2,657	3,286
Storage	1,628	1,676	1,376	1,360	1,080	1,038
Sub-total	**56,098**	**54,826**	**56,514**	**53,664**	**49,171**	**48,400**
Non-Manufacturing						
Photo & Graphics	2,980	3,058	3,538	3,309	3,923	3,571
Data Processing	3,514	2,967	5,295	6,500	7,571	7,653
Film/Video/Audio	1,828	2,081	2,364	2,729	2,930	2,993
Radio/T.V. Stations	3,083	4,273	3,849	5,829	5,039	5,041
Other Media	1,587	1,862	3,116	2,363	2,258	2,408
Newspaper Publish	5,109	5,059	5,042	5,691	5,341	5,144
Other Publishing	2,476	3,163	3,169	3,409	3,580	4,038
Transport Terminals	3,668	4,337	4,092	4,330	4,797	5,504
Business Equip	1,084	1,197	1,288	1,685	1,610	1,337
Lumber Yards	357	319	463	462	352	363
Wholesalers	4,673	4,542	3,868	3,454	3,806	4,308
Auto Repair/Service	3,278	3,358	3,530	3,368	3,446	3,319
Car Dealerships	2,284	1,904	1,630	1,546	1,669	1,843
Car/Truck Rentals	433	440	471	522	452	430
Sub-total	**36,354**	**38,560**	**41,715**	**45,197**	**46,774**	**47,952**
Expanded Industrial	**92,452**	**93,386**	**98,229**	**98,861**	**95,945**	**96,352**
All Employment Total	**493,196**	**510,049**	**522,109**	**545,252**	**563,688**	**576,040**

Source: Metro Planning Department Annual Employment Surveys.

* Metro Planning Dept Definition of "Manufacturing & Warehousing". Used in six-way employment breakdown.

Table 2
Full Time Employment by Sector, City of Toronto, 1983-1988

Manufacturing	**1983**	**1984**	**1985**	**1986**	**1987**	**1988**
Food Processing	9,804	9,630	10,137	10,014	7,739	7,869
Textiles, Leather	2,370	2,912	3,333	2,922	2,544	2,029
Metal Products	2,221	1,959	2,408	2,388	2,163	1,642
Chemicals	1,830	1,558	1,244	1,157	1,709	1,212
Clothing	12,390	13,379	13,170	11,736	12,329	10,556
Furniture & Fixtures	2,777	2,100	2,108	2,194	1,796	1,748
Machinery & Equip	1,701	1,337	1,247	899	452	841
Electrical Equip	3,140	3,458	2,725	1,810	1,488	1,383
Printing	3,367	3,422	4,030	3,549	2,983	2,733
Postal Sorting Stn	1,916	1,916	1,993	2,267	2,305	2,400
Other Manufacturing	9,093	7,443	8,167	7,787	7,725	7,423
Warehousing	1,504	1,548	1,900	2,135	1,758	2,246
Storage	1,503	1,533	1,285	1,092	953	833
Sub-total	**53,616**	**52,195**	**53,747**	**49,950**	**45,944**	**42,915**
Non-Manufacturing						
Photo & Graphics	2,759	2,827	3,313	3,064	3,711	3,277
Data Processing	3,407	2,790	4,886	6,007	6,946	6,907
Film/Video/Audio	1,734	1,967	2,207	2,359	2,716	2,753
Radio/T.V. Stations	2,994	4,100	3,714	5,579	4,678	4,837
Other Media	1,443	1,692	2,725	2,256	2,076	2,134
Newspaper Publish	4,590	4,683	4,669	4,592	4,535	4,291
Other Publishing	2,356	3,020	3,006	3,192	3,467	3,901
Transport Terminals	3,549	4,187	3,913	4,093	4,604	5,201
Business Equip	963	1,026	1,143	1,467	1,442	1,228
Lumber Yards	309	273	403	404	313	324
Wholesalers	4,483	4,363	3,720	3,255	3,566	4,111
Auto Repair/Service	2,892	2,942	3,121	2,939	3,137	2,975
Car Dealerships	2,214	1,838	1,539	1,428	1,573	1,723
Car/Truck Rentals	398	391	408	482	419	354
Sub-total	**34,091**	**36,099**	**37,767**	**41,117**	**43,183**	**44,016**
Expanded Industrial	**87,707**	**88,294**	**92,514**	**91,067**	**89,127**	**86,931**
All Employment Total	**447,735**	**458,507**	**464,090**	**473,193**	**491,795**	**493,332**

Source: Metro Planning Annual Employment Surveys.

Table 3
No. of Establishments by Sector, City of Toronto, 1983-1988

Manufacturing	**1983**	**1984**	**1985**	**1986**	**1987**	**1988**
Food Processing	122	101	121	125	106	102
Textiles, Leather	76	71	70	80	83	57
Metal Products	68	60	69	77	73	54
Chemicals	27	24	21	26	31	27
Clothing	459	438	465	462	523	465
Furniture & Fixtures	111	85	97	125	132	142
Machinery & Equip	43	38	28	30	24	33
Electrical Equip	34	24	24	26	25	31
Printing	359	376	404	345	300	324
Postal Sorting Stn	4	4	4	3	2	1
Other Manufacturing	466	467	555	691	648	575
Warehousing	73	72	102	102	96	93
Storage	462	411	348	364	322	304
Sub-total	**2,304**	**2,171**	**2,308**	**2,456**	**2,365**	**2,208**
Non-Manufacturing						
Photo & Graphics	880	950	992	926	984	978
Data Processing	186	203	246	305	340	364
Film/Video/Audio	229	214	215	251	285	231
Radio/T.V. Stations	50	55	60	61	48	60
Other Media	136	160	212	259	257	321
Newspaper Publish	72	77	77	65	60	64
Other Publishing	159	121	142	172	160	163
Transport Terminal	145	115	91	102	111	85
Business Equip	118	151	161	135	100	86
Lumber Yards	20	18	23	22	17	19
Wholesalers	613	583	509	483	490	523
Auto Repair/Service	677	666	689	669	642	618
Car Dealerships	143	122	120	129	131	136
Car/Truck Rentals	52	57	67	76	63	56
Sub-total	**3,480**	**3,492**	**3,604**	**3,655**	**3,688**	**3,704**
Expanded Industrial	**5,785**	**5,663**	**5,912**	**6,111**	**6,053**	**5,912**
All Establishment Total	**32,601**	**33,299**	**34,569**	**35,169**	**35,482**	**35,684**

Source: Metro Planning Annual Employment Surveys.

Table 4
Metropolitan Toronto and City of Toronto Employment, 1987

1987 Employment Data	Metro Total Emp	Toronto Total Emp	Toronto % of Metro
Manufacturing			
Food Processing	22,256	8,165	36.7%
Textiles, Leather	7,657	2,678	35.0%
Metal Products	19,386	2,169	11.2%
Chemicals	17,627	1,727	9.8%
Clothing	22,558	12,574	55.7%
Furniture & Fixtures	14,043	1,832	13.0%
Machinery & Equip	14,859	463	3.1%
Electrical Equip	13,419	1,523	11.3%
Printing	12,986	3,101	23.9%
Postal Sorting Stn	4,393	3,205	73.0%
Other Manufacturing	84,631	7,997	9.4%
Warehousing	21,014	2,657	12.6%
Storage	2,209	1,080	48.9%
Sub-total	**257,038**	**49,171**	**19.1%**
Non-manufacturing			
Photo & Graphics	6,039	3,923	65.0%
Data Processing	15,555	7,571	48.7%
Film/Video/Audio	3,584	2,930	81.8%
Radio/T.V. Stations	6,016	5,039	83.8%
Other Media	3,513	2,258	64.3%
Newspaper Publish	5,957	5,341	89.7%
Other Publishing	7,687	3,580	46.6%
Transport Terminals	11,903	4,797	40.3%
Business Equip	8,358	1,610	19.3%
Lumber Yards	1,108	352	31.8%
Wholesalers	20,005	3,806	19.0%
Auto Repair/Service	14,581	3,446	23.6%
Car Dealerships	9,182	1,669	18.2%
Car/Truck Rentals	1,445	452	31.3%
Sub-total	**114,933**	**46,774**	**24.2%**
Expanded Industrial	**371,971**	**95,945**	**25.8%**
All Employment Total	**1,276,010**	**563,688**	**44.2%**

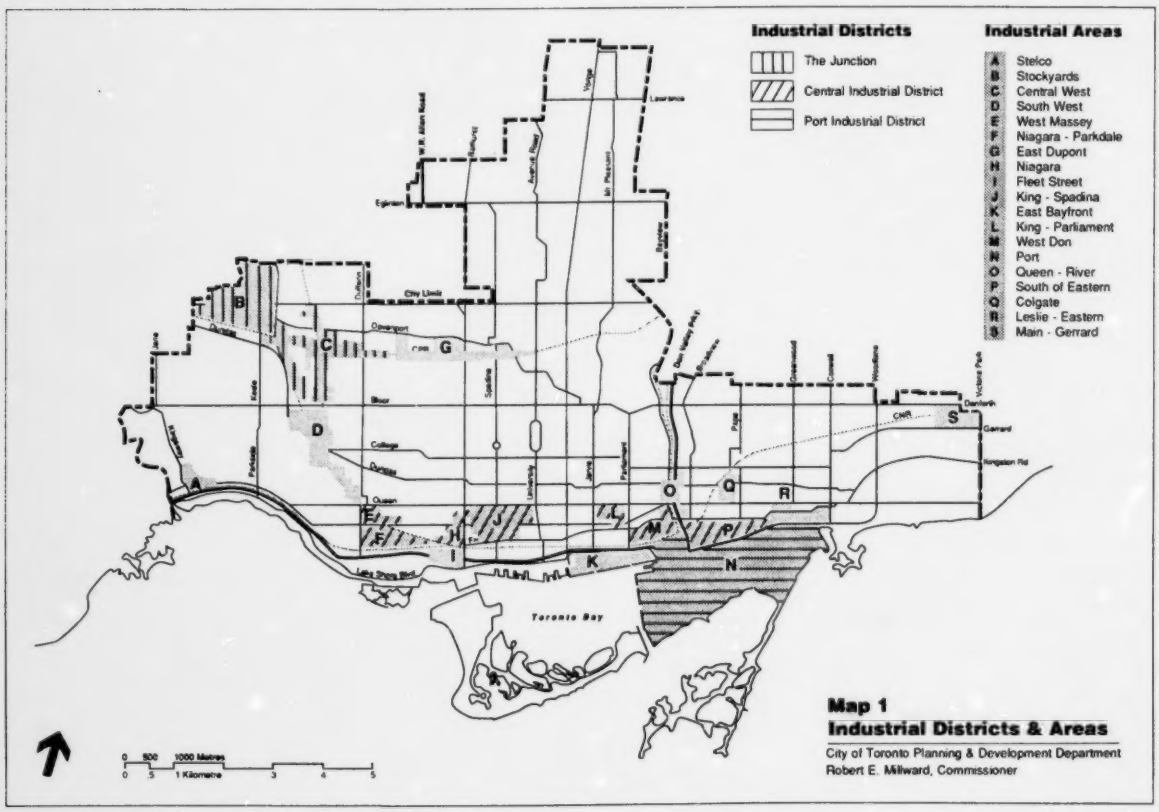
Source: Metro Planning Department Annual Employment Surveys

3.4 Character of the City's Industrial Areas

a) Identification of Industrial Areas

Map 1 depicts the major industrial districts and areas in the City of Toronto. Essentially the industrial districts represent a previous attempt at classifying industrial lands in the City of Toronto. The industrial areas, on the other hand, represent a more recently detailed classification.

The boundaries of each industrial area correspond as closely as possible to Official Plan industrial land use designations and industrial zones. Exact boundaries, however, are based on the basic unit of measurement of the Metro Employment file: the tax assessment block of the Standard Assessment System (S.A.S.) of the Ontario Ministry of Revenue. Employment and firm data for any one area are therefore based on the cumulative data of all the tax assessment blocks in that area.



b) Description of the Industrial Districts

There are three major industrial districts in the City of Toronto:

the Junction;

the Central Industrial District; and

the Port Industrial District.

The Junction

The Junction District has been a location for industry since the late 1800's and was named for the junction of the two major railway lines which traverse the area. This district is comprised of the Stockyards industrial area and the Central-West industrial area.

The development of industry in the Junction was accelerated in 1903 when the public stockyards were established in the Keele Street-St. Clair Avenue area. In conjunction with this early industrial development, the surrounding residential areas grew as areas which housed the local workers. Today, this close juxtaposition of housing and industry has sometimes created environmental conflicts.

In terms of employment, the Junction District is the second largest concentration of industrial activity in the City. The 519 establishments in the district are quite varied, although manufacturing establishments predominate, accounting for 67 per cent of the total industrial labour force of 10,700 workers.

The Central Industrial District

The Central Industrial District is the largest and most diverse of the industrial districts. It is located on either side of the downtown area and was, in the latter part of the 1800's, the first area in Toronto to be developed for industry. The proximity of the downtown area, railway facilities, and to a certain extent the Port Area, were the main initial attractions for industry.

The industrial development that began in the 1800's peaked in approximately 1950. At that time, industry occupied the majority of what is now defined as the Central Industrial District and was also prevalent in adjacent areas, particularly the south-west and south-east downtown areas. Since 1950, the combination of the expansion of the office sector in the downtown area and the relocation of industrial firms to suburban areas has resulted in a decline in the level of industrial employment.

Today, the Central Industrial District remains the largest concentration of industry in the city with approximately 25,000 industrial employees, half of whom are located in the King-Spadina industrial area. Other industrial areas within the Central Industrial District include West Massey, Niagara-Parkdale, Niagara, King-Parliament, West Don, and South of Eastern west of Leslie Street.

Although the Central Industrial District contains a wide variety of establishments, its major characteristics are:

- a few large manufacturing establishments such as Lever Brothers;
- the garment/fashion industry centred in King-Spadina;
- a large number of printing and publishing establishments on either side of the Downtown; and
- a myriad number of other small and entrepreneurial industrial establishments specializing in data processing, graphics, and the media which occupy multi-storey buildings that have been sub-divided for a variety of small firms.

Two recent major redevelopment schemes within the Central Industrial District will once again change its face. The most recent initiative known as the St. Lawrence Square will result in the complete redevelopment of 66 acres of industrial land in the West Don area for housing purposes. This was preceded by the approved redevelopment of 27 acres of vacant industrial land west of Bathurst Street, that were formerly occupied by Massey Ferguson; as a business technology centre with a particular emphasis on computer service facilities and industry with a significant research and development element. Projected industrial employment is estimated at approximately 15,000 employees.

The Port Industrial District

Although Toronto's Waterfront has been the location of industry since the mid-1800's, the Port District was not created until Ashbridge's marsh was filled in between 1913 and 1917 and the Ship Channel and Turning Basin were dredged. Since then, Port Development has traditionally centred around the Marine Terminals operated by the Toronto Harbour Commissioners and around water related industries which are oriented to the processing, storage and distribution of bulk products that have local economic linkages and advantages. For example, cement plants in the Port are supplied by ship. These plants provide all the cement for nearby ready mix plants which service the vast amount of downtown construction by truck. Minimizing distribution costs reduces the cost of downtown construction which in turn creates the market for such a relationship in the first place.

While these types of uses continue to dominate in the Port, the decline in total cargo tonnage since the 1960's has opened up opportunities for the introduction of higher employment generating industries. To a certain extent, there is evidence that such a process is currently underway. Since 1983, Port industrial employment has increased from 2000 to 3000 employees. A substantial amount of this new employment appears to be related to the rapidly expanding recycling industry, which relies on the excellent truck access in the immediate area rather than on water transport. Additional opportunities for industrial expansion are discussed in the Waterfront Part I Plan.

Industrial Areas Outside the Industrial Districts

In addition to the three major industrial districts, there are also additional industrial areas that have one or more of the following characteristics:

1. Port-oriented industries located along the Waterfront (East Bayfront);
2. Areas containing one major industry and possibly a number of smaller industries such as Colgate and Stelco; and
3. Areas containing a number of smaller industries which perform a regional distribution, wholesale or service function (Dupont Street, Main-Gerrard, Leslie-Eastern, Queen-River).

Since these areas are smaller in size than the concentrations of industry in the three major districts, questions of compatibility with and pressure from surrounding non-industrial areas, especially from residential uses, are of critical importance.

c) Industrial Trends in the Industrial Areas

Tables 5 to 7 present some general information on the 19 industrial areas in the City. Appendix 1 contains more detailed 1988 data on each of these areas. The primary findings are:

- Forty per cent of the total lands designated for industry are in the Port Area. Other substantial industrial land acreages are found in the Stockyards, South of Eastern and Central-West.
- Total industrial employment has remained stable since 1983. However, as for the City totals, growth in non-manufacturing industrial employment has compensated for a decline in manufacturing.
- Seventy per cent of all industrial employment in the industrial areas is in the manufacturing sector.
- All of the industrial areas contain non-industrial employment, which has increased since 1983. If extreme cases are filtered out, average industrial employment per area is in the 50 - 60 per cent range.
- As should be expected, there is tremendous variation in the amount of industrial employment by area. King-Spadina has by far the largest industrial employment base (+ 10,000). On the other hand, Leslie-Eastern and Main-Gerrard each have less than 300 industrial employees. Other areas with an industrial employment base of less than 1000 employees, are Fleet Street (Molson's), Massey West, Stelco and the West Don (St. Lawrence Square).
- For most areas, industrial employment has been relatively stable since 1983. The Stockyards and the Port, which have respectively gained 1600 and 1000 industrial jobs, and King-Spadina which has lost 3000 industrial jobs, are the notable exceptions to this general trend.

Table 5
Ranking of Industrial Areas by Total Acreage

Industrial Area	Acreage	Hectares
Port*	1000.0	405.0
Stockyards	246.0	99.6
South of Eastern	189.0	76.5
Central West	183.0	74.0
King-Spadina	115.60	46.8
South-West	115.30	46.7
East-Bayfront	113.90	46.1
Dupont East	90.60	36.7
Niagara-Parkdale	90.50	36.6
West Don	66.00	26.7
*Main-Gerrard	48.30	19.6
Fleet Street	46.80	18.9
Queen-River	37.60	15.2
Niagara	36.90	14.9
Stelco	35.30	14.3
Colgate	31.10	12.6
King-Parliament	30.00	12.1
Massey West	29.80	12.0
Leslie-Eastern	12.40	5.0
Total	**2518.10**	**1019.5**

Source: Assessment File, 1987

* Acreages underestimated due to lack of tax assessment data on federally owned land.

Table 6
Employment by Sector for 19 Industrial Areas, 1983 and 1988

Sector	1983	1988
Manufacturing		
Food Processing	7,252	6,693
Textiles, Leather	1,634	1,775
Metal Products	1,572	1,508
Chemicals	1,511	1,015
Clothing	9,231	8,519
Furniture & Fixtures	2,059	1,508
Machinery & Equip	1,023	655
Electrical Equip	2,608	1,236
Printing	1,796	995
Postal Sorting Stn	2,618	3,150
Other Manufacturing	7,064	5,776
Warehousing	1,057	1,830
Storage	453	223
Sub-total	**39,878**	**34,874**
Non-Manufacturing		
Photo & Graphics	1,232	1,932
Data Processing	209	437
Film/Video/Audio	583	1,087
Radio/T.V. Stations	-	335
Other Media	142	623
Newspaper Publish	2,234	2,214
Other Publishing	201	366
Transport Terminals	822	2,641
Business Equip	556	805
Lumber Yards	288	229
Wholesalers	2,214	2,259
Auto Repair/Service	1,069	1,204
Car Dealerships	120	322
Car/Truck Rentals	28	158
Sub-total	**9,698**	**14,612**
Expanded Industrial	**49,576**	**49,486**
All Employment Total	**70,884**	**80,758**

Source: Metro Planning Department Annual Employment Surveys.

Table 7
Employment by Industrial Area 1983 and 1988

Industrial Area	All Employment 83	All Employment 88	Industrial Employment 83	Industrial Employment 88
Colgate	2,558	2,755	2,414	2,290
Central-West	6,524	6,410	5,260	5,212
Dupont East	3,389	5,535	1,489	1,545
East Bayfront	2,555	2,615	1,501	1,575
Fleet Street	998	1,027	830	710
King-Parliament	3,924	4,203	2,592	2,459
King-Spadina	19,162	19,110	13,163	10,151
Leslie-Eastern	270	214	192	139
Main-Gerrard	988	1,181	298	299
Massey West	714	756	536	323
Niagara	2,747	2,786	2,144	2,085
Niagara-Parkdale	4,489	5,280	4,083	3,892
Port	3,358	4,328	1,989	3,095
Queen-River	1,857	2.415	1,032	1,203
South of Eastern	6,421	8,530	4,343	4,918
Southwest	3,849	4,718	2,587	2,807
Stelco	546	660	431	454
Stockyards	5,333	6,934	3,856	5,553
West Don	1,202	1,301	836	773

Source: Metro Planning Department Annual Employment Surveys.

A note of caution, however, must be exercised in the interpretation of these results. In many cases, non-industrial employment in the industrial areas is overstated because of the way the boundaries of the industrial areas were defined. For example, all businesses on Danforth Avenue in the Main - Gerrard area had to be counted in order to include the substantial industrial employment on the south side of the block.

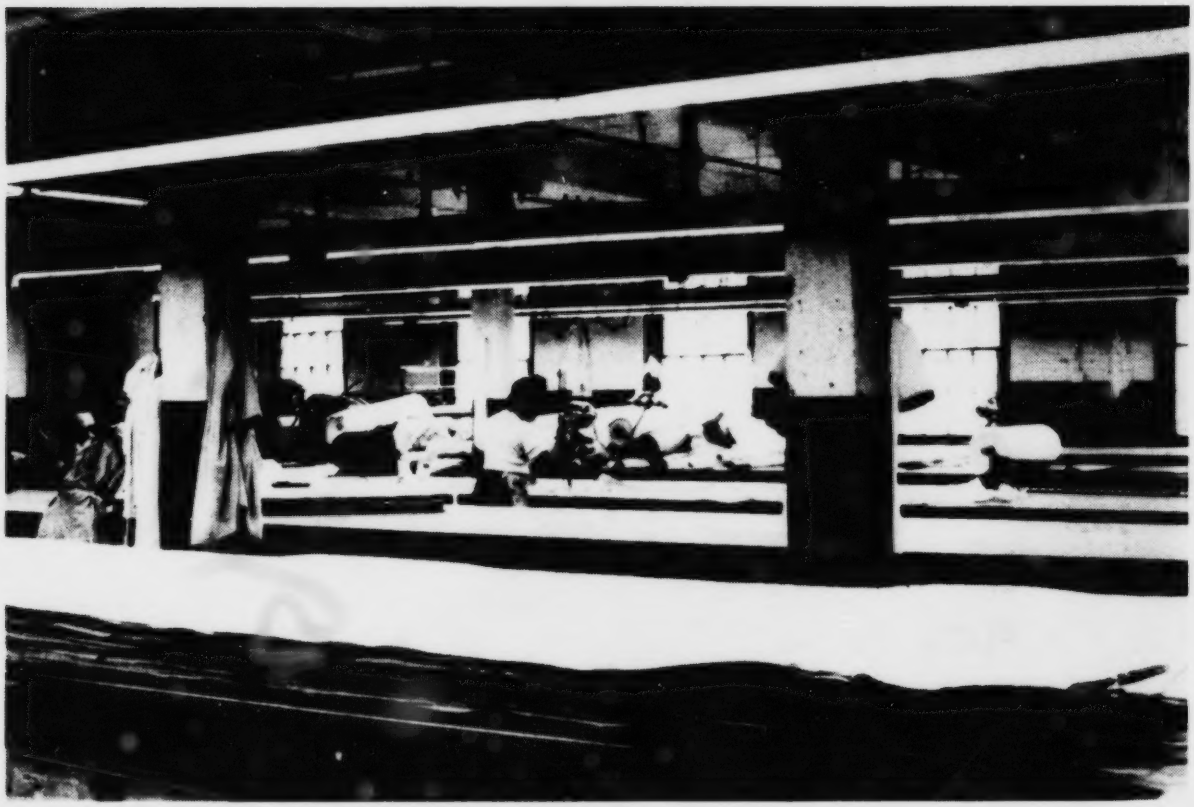
3.5 Summary

Industrial employment in the City of Toronto is a major element of the local economy accounting for one-fifth of total City employment and one-quarter of Metropolitan Toronto industrial employment. In addition, industrial areas are a major feature of the urban structure of the City of Toronto comprising over 2500 acres (1020 hectares) of land.

Two major industrial trends have emerged in the City of Toronto during the 1980's. The first trend is the stabilization of overall industrial employment, which since 1983 has fluctuated around the 95,000 employment level. The previous three decades were characterized by a large loss of City of Toronto industrial employment. The second major trend is the changing nature of industrial employment. In 1983, 40% of industrial employment was non-manufacturing. A significant amount of this employment was in sectors such as transportation and wholesaling. Today, 50% of all industrial employment is non-manufacturing, within which the emerging sectors of data processing, media, and publishing dominate.

Conversely, the traditional manufacturing industrial sector continues to decline. Within this sector, 7,700 jobs have been lost in the last six years. A further erosion of 2,500 manufacturing jobs can be expected as a result of the recent plant closure announcements from Stelco, Maple Leaf Mills, Rowntree Mackintosh, Inglis and Molson's. However, it is important to note that even taking the above expected job loss into account, the City of Toronto will still retain a manufacturing base in excess of 45,000 workers.

As should be expected there is tremendous variation in the amount of industrial employment by area. King-Spadina is the most successful industrial area with over 10,000 industrial workers. At the other end of the spectrum, Leslie-Eastern and Main-Gerrard each have an industrial employment base of less than 300 employees.



4

Economic Trends

4.1 Introduction

In March, 1986, the Metropolitan Council approved a program to review the 1980 "Official Plan for the Urban Structure: Metropolitan Toronto." Phase I of the review process is the preparation and publication of a series of technical and proposal papers covering five major subject areas:

- regional assumptions and the concept;
- housing and residential development;
- employment areas and activities;
- transportation; and
- open space and environment.

The Changing Metropolitan Economy, 1986, and Industrial Areas, Metropolitan Plan Review, 1988, are two background papers of the Phase I review process. Key aspects of each report that are considered especially relevant to the City of Toronto's industrial policy review are discussed in this section. Although statistics in these reports refer to the mid-1970 to mid-1980 period, overall trends are still prevalent today.

Appendix 2 includes all tables referred to in the text.

This section also examines the future propsects of the major industrial sectors in the local economy: prospects which in some instances will be affected by the U.S. - Canada Free Trade Agreement. The source for this discussion is a City of Toronto Planning and Development report dated May 25, 1988 which summarizes the results of five sector-specific workshops on free trade.

4.2 The Changing Metropolitan Economy, 1986

a) National and Provincial Economic Trends

- In 1985, the service sector including transportation, communications and other utilities employed 70% of all Canadians and 68% of Ontario's employed labour force. This represents a 4-5% percentage increase since 1976 (see Table A2.1).
- In 1985, the secondary sector including manufacturing and construction accounted for 22% of all Canadian jobs, and 28% of Ontario's employment. In both instances, these figures represent slight percentage decreases since 1976 (see Table A2.1).
- The movement toward the service sector is illustrated by trends in net job creation with business services leading the way in terms of employment increases between 1974 and 1982 (see Table A2.2).
- Table A2.3 provides a 1984 profile of Ontario's manufacturing sector. In most cases, Ontario's employment represents a half or more of Canada-wide employment.
- Direct spin-offs from manufacturing are greater than for any other sector of the economy. While the multiplier effect for the service sector in Ontario is 1.3, the manufacturing sector has a higher rate at 1.9. Therefore, loss of manufacturing jobs has a greater economic impact than in the service sector.
- Between 1974 and 1979, the Ontario gross domestic product increased at a somewhat lower rate than for Canada as a whole (2.7%); however, between 1981 and 1984, Ontario exhibited a higher growth rate than the rest of Canada (see Table A2.4).

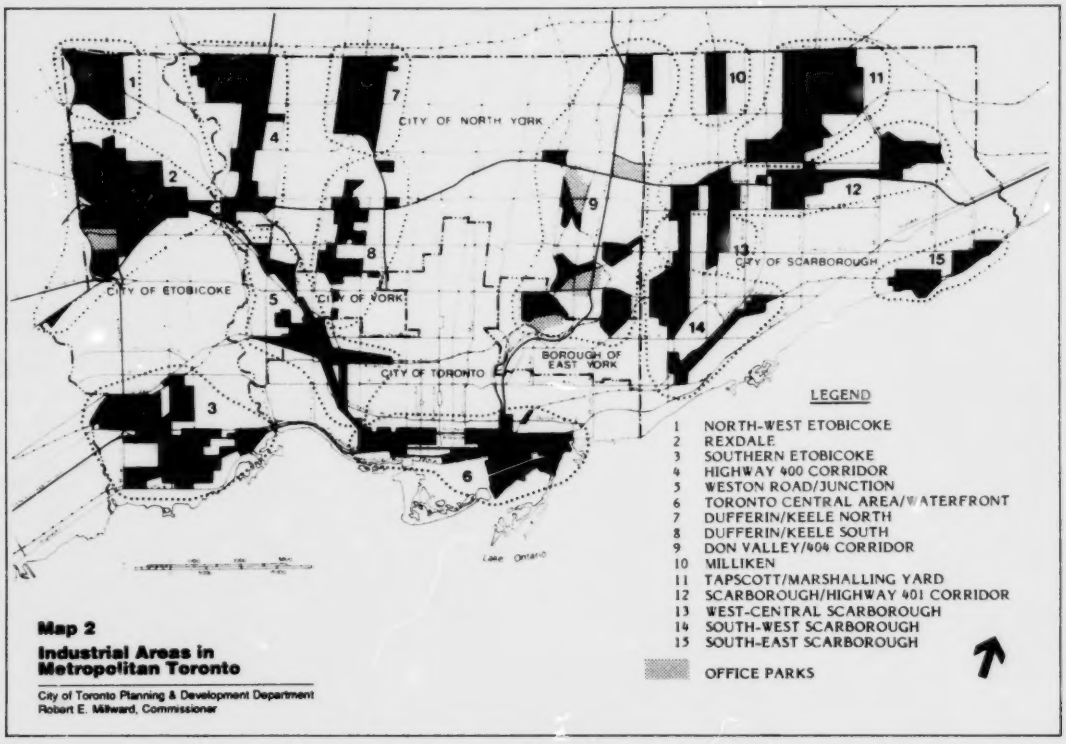
b) The Economy of the Toronto Region

- The importance of the Region's economy to both the Province and Canada is illustrated in Table A2.5. In 1985, the Toronto C.M.A. accounted for 21.5% of Canada's manufacturing employment, 19% of its trade and 27% of its finance, insurance and real estate employment.
- The service sector has been the fastest growing sector of the Region's economy, particularly within Metro Toronto (see Table A2.6).
- Along with a shift of population growth outside of Metropolitan Toronto to the surrounding municipalities, there has also been a movement of employment. In 1971, employment in Metropolitan Toronto accounted for 82% of all jobs in the Toronto C.M.A. By 1981 this had fallen to 76% (see Table A2.7).

4.3 Industrial Areas, Metropolitan Plan Review, 1988

a) Character of Industrial Areas

- The major industrial lands in Metro Toronto as of 1985 are depicted on Map 2. In the City of Toronto, these include the Port, the Central Industrial District and the Junction/Stockyards.



Map 2
Industrial Areas in Metropolitan Toronto

City of Toronto Planning & Development Department
Robert E. Millward, Commissioner

- Industrial areas are very significant economic areas accounting for 414,700 full-time jobs, about 40% of the jobs in Metro in 1985 (see Table A2.8).
- While industry is the dominant activity group in these areas it is by no means the only source of economic activity. For example, 25 per cent of all office employment and 31 per cent of all retail employment in Metro Toronto are located in these districts (see Table A2.8).
- Over 80 per cent of the industrial employment in the industrial districts is within the manufacturing sector (see Table A2.9).
- There are approximately 9232 hectares of designated industrial land in Metropolitan Toronto, most of which is developed. Only 14 per cent was vacant in 1985. Industrial uses account for 70 per cent of the developed land and 68 per cent of the gross floor area in industrial areas (see Tables A2.10 and A2.11).
- A profile of industrial areas reveals that industrial areas in Metro are not homogeneous. A high concentration of industrial employment and uses are located in the industrial areas west of Keele Street and in the Toronto Central Area/Waterfront. Most of the mixed industrial-commercial activities are generally located in the newer industrial areas north of Highway 401. A significant proportion of office activities are concentrated in the industrial areas adjacent to Office Parks in the Don Valley/404 Corridor.

- A distinct urban structure is emerging in the mixing of activities in industrial areas. Arterial road frontages are usually mixed-use while the interior of industrial areas are dominated by industrial uses.
- The Toronto Central Area/Waterfront is quite different from Metro's other industrial areas. In general, industry is increasingly consolidating into a smaller land area as sites are redeveloped for other purposes (i.e. St. Lawrence Square). The Port area is one of the few remaining areas in Metro with a significant amount of vacant industrial land.

b) Metropolitan Toronto in the Context of the Region

- The regions surrounding Metro Toronto possess a huge inventory of designated industrial land: over 24 000 hectares with 45% of that located in Peel, 22% in Durham, 17% in York and 16% in Halton. Nearly 60% of this land was vacant in 1986 (see Table A2.12).
- Metro's share of the Region's industrial land absorption declined to only 12% during the period 1981-1985. During the period 1976-1985 the surrounding regions had an annual absorption of 336 hectares of industrial land (see Table A2.13).
- Data for 1986 from the Toronto Real Estate Board indicate that the areas outside Metro contain about 14 700 300 sq.m. of industrial floor space compared to 26 900 600 sq.m. of industrial floor space in Metro (see Table A2.14).

c) Recent Industrial Trends in Metropolitan Toronto

- Full-time employment in industrial areas declined slightly during the period 1981-1985. The industrial sector experienced the greatest decline. Both the retail and institutional sectors have experienced marginal growth (see Table A2.15).
- There was a net increase of 3,589 establishments in Metro's industrial areas during the period 1981-1985. Over 40% of the net new establishments were in office activities. The retail sector accounted for 35% of the net growth and industry 20% (see Table A2.16).

4.4 U.S. — Canada Free Trade Agreement, Planning and Development Department, May 25, 1988

Five sector - specific workshops on free trade were held by the Planning and Development Department in February and March of 1988. The primary results are summarized below.

Financial Services Sector

- Of the five sectors, only financial services indicated unanimous support for the Free Trade Agreement.

- On the whole, workshop participants did not anticipate direct impact from the Agreement, because much of this sector has in effect experienced free trade with the U.S. for many years.
- Workshop participants, however, expected substantial indirect microeconomic impacts as the demand for financial services increases with output and income increases.

Food and Beverage Sector

- The sector next most supportive of the agreement was the food and beverage sector. A number of firms represented, particularly in the meat processing groups were anticipating expansion opportunities into the U.S. and not much additional U.S. competition within their own market.
- Dairy and confectionery firms thought that the agreement would be neutral in its impact, and therefore have adopted a wait and see attitude.
- Representatives of organized labour, however, were opposed to the agreement. They anticipate, and are already being presented with proposals from management for more concessions in labour agreements to offset anticipated competition from the U.S..

Film and Television Sector

- Most attendees at this workshop felt that the direct impact of the Free Trade Agreement on the film and television industry would be neutral, because of the cultural industries exemption.
- There was concern, however, regarding possible negative indirect impacts including:

  a) a higher exchange rate making it more difficult for the U.S. industry to maintain their current level of activity in Toronto; and

  b) a provision in the agreement that new cultural support programs in Canada — i.e. beyond the support framework now in place — could trigger U.S. retaliation to equivalent commercial effect.

Printing and Publishing Sector

- There was general agreement among those present that many local firms would not survive without the current high levels of tariff protection applying to many products in this sector.
- According to attendees at this workshop, the Canadian industry lacks the physical production capacity to substantially increase its exports to the United States.

- At the same time, the Agreement will expose small Canadian producers to larger and more efficient American competitors, which will result in job losses in the Canadian industry, notably in sectors that deal with advertising catalogues, other promotional materials and greeting cards.

Fashion Sector

- Finally, the fashion industry workshop produced an almost unanimous negative assessment of the free trade agreement.
- Essentially, the fashion industry sees itself as unlikely to make major gains in the U.S. due to rules of origin restrictions — i.e. North American fabric must be used in clothing entering the U.S. to qualify for tariff removal. On the other hand, the Canadian industry would be threatened in its domestic market by removal of a comparatively high tariff on U.S. clothing imports — imports which are already heavily promoted in Canada by "spillover" advertising from U.S. media.
- As a result, there is the potential for the Canadian industry as a whole to shrink if the combined rules of origin and spillover promotion handicaps are as significant as many in the industry fear.

4.5 Summary

Trends in the national and provincial economies reflect the introduction of new technologies as well as structural changes in the economy and international trade. The result is increasing domination by the service sector. Despite the shift to the service sector, it is evident that manufacturing is still important to the economy because of its high multiplier effect stimulating more growth in the rest of the economy than other types of activities.

The Metropolitan Toronto Region is the economic heartland of the country acting as the administrative, financial and service capital of Ontario as well as having a significant manufacturing sector. Various parts of the regional economy have different specializations and functions. The strength of the local economy depends on this diversity.

For the most part, Metropolitan Toronto's industrial areas are functioning well. New jobs are continually being created and overall employment in these areas has remained relatively constant during the 1980's. Industrial areas appear to possess the flexibility needed to replace a slowly declining manufacturing sector with new kinds of industrial and other economic activity.

There is one ominous cloud however, on the horizon. Absorption of industrial land for industrial purposes. Either occurs through development of vacant land, or through redevelopment and intensification of existing sites. The first process is the means by which most industrial development in Metro has historically occurred. However, by the end of

this century, Metro is faced with the prospect of having little, if any, vacant industrial land. New industrial job creation in Metro will therefore have to increasingly rely on the process of redevelopment and intensification. Experience to date has shown that this latter process usually entails loss of manufacturing employment, to be replaced by uses such as office and retail.

Preliminary evidence indicates that the free trade agreement will definitely have an effect on the local economy, and that this effect will vary dramatically by different sectors. Of all the sectors, the only sector seeing itself as a clear winner from the free trade agreement is financial services, already the dominant sector in the economy. On the other hand, most manufacturing sectors see themselves as threatened, particularly the fashion industry. What is unknown, however, is the net positive or net negative effect or to what extent negative impacts can be ameliorated by proactive economic development strategies.

N

5

Conclusions and Recommendations

5.1 Conclusions

The City of Toronto Official Plan aims to maintain and protect industrial land for industry so as to provide a variety of employment opportunities for City of Toronto residents. Social and economic diversity are the desired goals. The policy is implemented through a combination of exclusive industrial zoning and an economic development strategy that is based on intervention targeted toward economic sectors which require encouragement from the City in order to flourish.

Generally, the City of Toronto industrial policy has been remarkably effective in achieving its goals. In the three decades prior to the introduction of the industrial policy, the City lost at minimum, one-half of its total industry. This has not been the norm during the 1980's. Overall industrial employment has remained relatively stable, hovering around the 95,000 total employment level. Industrial employment in the City currently comprises one-fifth of total City employment and one-quarter of Metropolitan Toronto industrial employment.

Certain industrial sectors have been particularly successful in the 1980's. The non-manufacturing industrial sector consisting primarily of media, data processing and publishing, has recorded the most substantial employment increases. Other success stories include the fashion, and the photo and graphics industries. It is the proliferation of these uses which primarily accounts for the substantial demand for City of Toronto industrial space, particularly in close proximity to the downtown. Hence, during the 1980's, the vacancy rate for industrial buildings has never risen above 5.1%. (Source: Royal LePage for 1980-1982, City of Toronto since 1983). This same demand also accounts for the recent construction of new multi-storey industrial buildings in such areas as King-Spadina.

The manufacturing sector has not fared as well as the non-manufacturing sector. If recent plant closure announcements by such companies as Molson's, Rowntree MacIntosh, Inglis, Maple Leaf Mills and Stelco are factored in, approximately 10,000 manufacturing jobs have been lost since 1983. While the rate of manufacturing employment loss has declined compared to the previous three decades and whereas the general trend toward dimin-

ished manufacturing employment and more service sector employment is characteristic of similar trends at the national, provincial and regional levels, a continued decline in the City's manufacturing base must still be viewed with concern. At the most basic level, the remaining 45,000 manufacturing jobs are at stake. Without such employment, the goals of economic and social diversity may be jeopardized.

As detailed previously, the growth in non-manufacturing industrial employment is the result of a transforming economy. There are, however, some serious questions which must be addressed in order to assess whether employment growth in the non-manufacturing sector will achieve the goal of economic and employment diversity upon which the original industrial policy was based to the same extent as manufacturing sectors. For example, what are the wage and occupational trends in these industries compared to office employment and traditional manufacturing employment? Are the new industrial jobs able to contribute to social diversity in the same way as traditional manufacturing jobs? To assess these trends it will be necessary to analyse data based on the 1986 Census, which are still being released, and on the basis of this analysis to compare occupational and income levels in that part of the service sector which is classified as industrial in the City of Toronto with occupational and wage levels in the manufacturing sector. The objective of this exercise will be to determine the extent to which non-manufacturing industrial employment in the City substitutes for the loss of manufacturing employment both socially and economically. Until the nature of the "fit" between the industrial jobs and traditional manufacturing jobs is better understood, it is not possible to draw definitive conclusions about the efficacy of the objective of social and economic diversity that is a basic goal of the City's industrial policy.

A further related issue would be to explore the relationship between such uses and the manufacturing sector in terms of impact on land prices. These issues recently came to the forefront during the May 1st, Economic Development Committee's discussion on the Inglis Plant. It is my intention to address these issues within the context of the overall 1991 Official Plan Review process. The results of this work will then be directly related to a comprehensive review and update of permitted industrial uses and their definitions contained in Zoning By-law 438-86.

Finally, if the apparent trend of continued growth in non-manufacturing sectors with a concommitant loss of manufacturing jobs identified in this report continues, and every indicator suggests that it will, then additional questions may have to be addressed in the near future. These include:

1. What kind of physical resources (land and buildings) do/will the new industrial uses require?
2. What is the demand for this kind of space likely to be over the next 20 or more years?
3. Is there sufficient industrially designated land in the City to accommodate that projected growth?

Until there are clearer answers to these and other questions respecting the changing face of industry, the full long term impact of the loss of industrial land through redesignation to another land use cannot be predicted. Accordingly, the redesignation of industrial land should not occur on a piecemeal basis, but should only be considered on the basis of a broader study which could take into account, among other things, the larger changing context.

Moreover, it is essential, given the dynamics of the land market, that the industrial policy evolve, as it must do, in a measured, manageable and orderly fashion. No single industrial site can reasonably be viewed in isolation from other neighbouring industrial sites. Site by site rezonings can seriously erode the industrial base by fuelling the expectation that similar site specific applications will be successful, thereby exerting upward speculative pressure on land prices. As a result the lands become unaffordable to industry, a circumstance which is then cited as "evidence" that industry is not viable. This cycle of speculative change has been shown to be very destructive time and time again.

It is clear that the changing face of industry must be recognized; and its future needs in terms of physical resources assessed; but these changes must be considered through an appropriate mechanism for change. If there is a need to rationalize industrial land use policies in the industrial districts in certain areas of the City as a result of changes which have occurred in recent years, then it is essential that the matter be approached in a rational and systematic fashion.

Section 4 of the Official Plan currently does not require the undertaking of a Part II Plan in order to change the Official Plan and zoning in industrial areas. As I have noted, the ability to achieve site specific redesignation of industrial land can have and has had a detrimental effect on the industrial land market and consequently the industrial policy. It is my opinion that the introduction of such a requirement would be the most effective land use tool for strengthening the City's industrial policy and for ensuring that an equitable process is followed in each instance where a change is contemplated. The adoption of such a policy would prevent site by site erosion of the City's industrial land, which if carried to a speculative extreme, could undermine the industrial market in the City.

Sections 4.1, 4.2, and 4.3 of the Official Plan state that:

> *"4.1 In order to support the City's function as a producer of industrial goods and services, to maintain a diversified economic and social structure within the City, and to retain industrial employment opportunities in areas having convenient access to neighbourhoods housing industrial workers, it is the policy of Council to:*
>
> *(a) encourage the retention and renewal of industry in areas of the City which are viable for continued industrial use;*

(b) enact amendments to the Zoning By-law in order to reserve appropriate parts of the City for primarily industrial uses; and

(c) seek to ensure that sufficient land is available in the City to accommodate existing, new, and relocating industrial firms the operations of which are suited to a City location.

4.2 In identifying areas of the City which are viable for continued industrial use, Council shall have regard for, among other matters, the following:

(a) the location of existing concentrations of industrial activity;

(b) the existing stock of industrial buildings;

(c) the accessibility of areas, particularly by public transit, for industrial workers;

(d) the location of major arterials, expressways, railways, and port facilities for the efficient movement of goods; and

(e) any local considerations which may affect the industrial viability of an area.

4.3 In accordance with Section 4.1 of this Plan, Council shall, subject to the provisions of Section 4.17 to 4.22, enact amendments to the Zoning By-law, applicable to areas designated Restricted Industrial Area, General Industrial Area, or Heavy Industrial Area, which serve, among other matters, to:

(i) prohibit residential uses; and

(ii) limit commercial uses to those which are incidental to industrial uses or areas."

These statements represent the core of the City's industrial policy. The addition of a statement requiring a broader based study prior to redesignating any industrial lands would represent a further means of communicating the importance the City places on industrial land and employment, and would better secure the future of the City's industrial policy. I have consulted with the Industrial Coordinating Committees in developing this proposal, and it is anticipated that they will strongly endorse this recommendation.

5.2 Further Studies

I have identified a number of areas of further work that should be undertaken in order to address issues raised in this report. One study, respecting the wage, occupational and other job quality trends in the growing non-manufacturing sectors, was touched upon in previous reports and will be pursued by staff when the relevant 1986 Census data are available. The assessment of the impact on land prices of the industrial sectors currently experiencing growth will also be conducted in-house using existing staff resources.

The broader study projecting into the future the demand for industrial lands and other resources to accommodate growth in non-manufacturing industry will require the services of outside consultants. I estimate that a study of this nature would likely cost $35,000. Funds for such a study were not allocated in the Planning and Development Department 1989 Operating Budget. As a result, in order to complete this study funding will have to be provided.

5.3 Recommendations

1. That the City Solicitor, in consultation with the Commissioner of Planning and Development, be requested to submit a draft by-law to amend Section 4 of the Official Plan by the introduction of the following paragraph:

   4.4 Council will not redesignate land so as to permit any non-industrial use in areas designated in this Plan as Areas of Industry, Restricted Industrial Areas, General Industrial Areas, and Heavy Industrial Areas without first having considered a study of the area undertaken for the purpose of recommending policies for adoption in Part II of this Plan. Council will not effect such redesignation except by adoption of policies as may appear appropriate in light of the study, in Part II of this Plan.

2. That the Commissioner of Planning and Development be requested to report on:

   1) wage and occupational trends in the emerging non-manufacturing industrial sector; and

   2) the impact of such uses on industrial land prices.

3. That the Commissioner of Planning and Development be authorized to invite proposals to undertake an assessment of the projected future demand and land use needs to accommodate growth in industry, and especially the non-manufacturing sectors currently experiencing growth in the City, at an estimated cost of $35,000.00, recognizing that funds for this expenditure are not available in the Planning and Development Department's 1989 Operating Budget, and will have to be provided if the study is to proceed.

4. That the Commissioner of Planning and Development report on the detailed terms of reference for the aforementioned study and the selection of a consultant and the required funds to carry out the study.

5. That the Commissioner of Planning and Development, in consultation with the City Solicitor and the Commissioner of Buildings and Inspections, undertake a comprehensive review and update of permitted industrial uses and their definitions contained in Zoning By-law 438-86.

6. That the Commissioner of Planning and Development prepare an annual monitoring report on industrial employment trends in the City of Toronto.

40

Technical Appendices

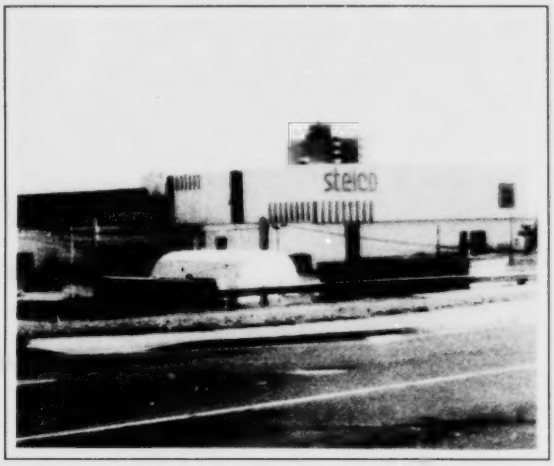
Appendix 1: Industry inToronto

Appendix 1 contains detailed information on the major industrial areas in the City of Toronto.

Area A Stelco

Zoning	Official Plan
C2 L1	Area of Industry
C3 V2	Area of Industry

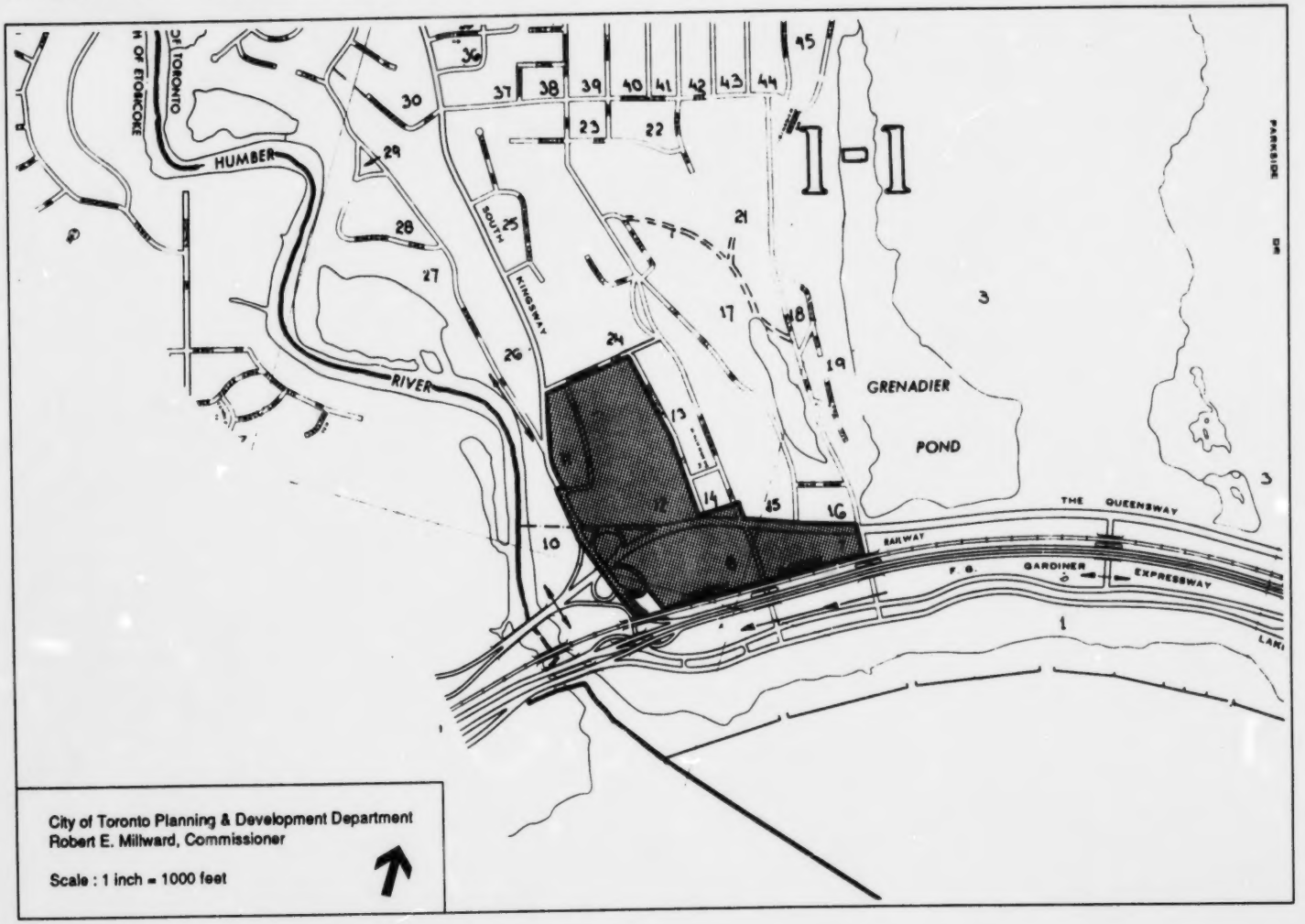
Number of Assessment Blocks	4
Acres	35.3
Number of Establishments	41
Total Employment	660
Industrial Employment	454
% Manufacturing	60
% Other Industrial	9
% Non Industrial	31



Establishments with 100 Employees +	Address	Employment Range
Stelco Inc.	0 The Queensway	250 - 500

Industrial Areas & Assessment Blocks

Stelco **A**



Area B Stockyards

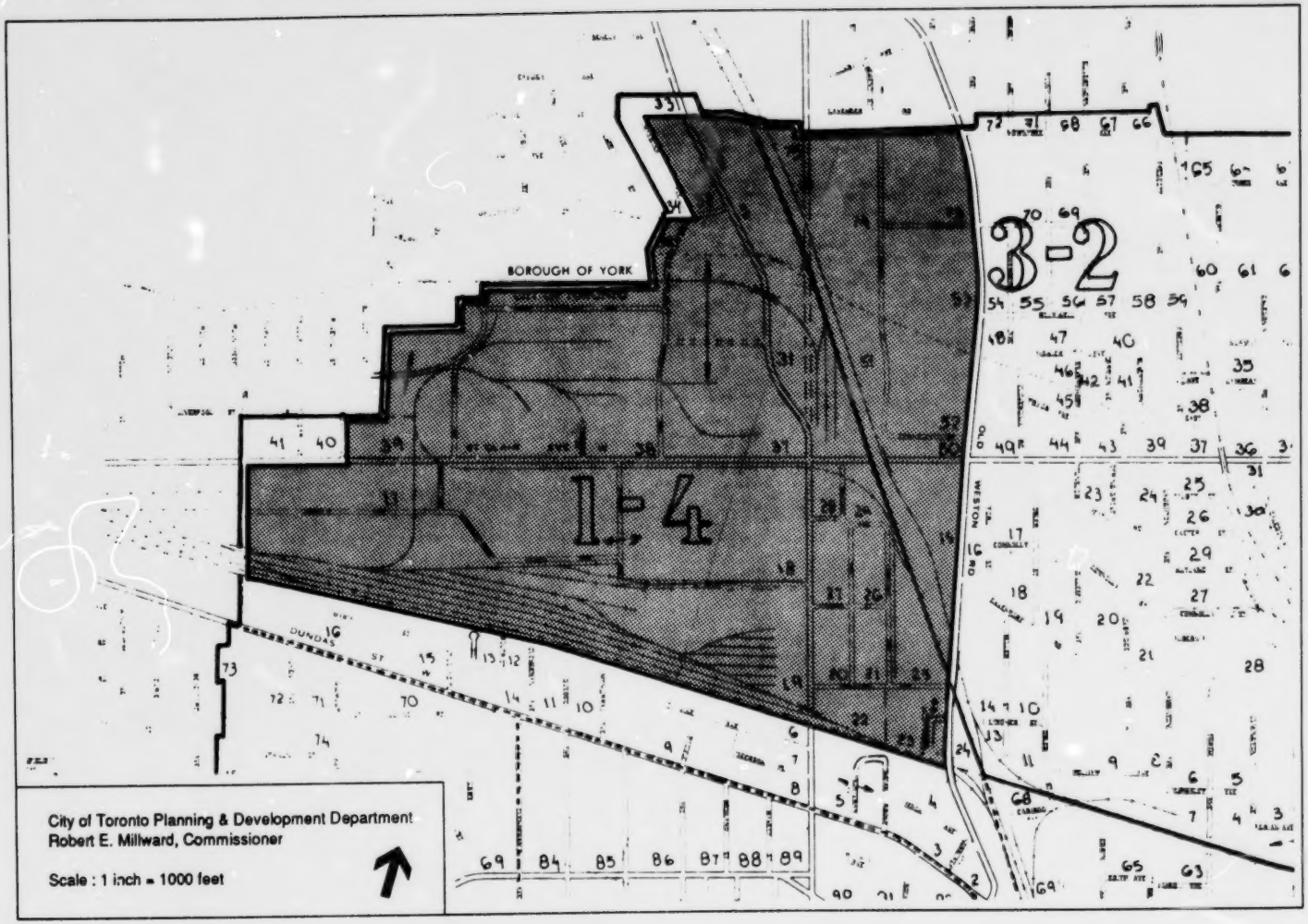
Zoning	Official Plan
I2 D2	Restricted Industrial Area
I3 D5	General Industrial Area
I4 D7	Heavy Industrial Area
IC D2	General Use Area

Number of Assessment Blocks	26
Acres	246
Number of Establishments	213
Total Employment	6934
Industrial Employment	5553
% Manufacturing	66
% Other Industrial	14
% Non-Industrial	20

Establishments with 100 Employees +	Address	Employment Range
Bonanza	404 Old Weston Rd.	100 - 250
Cadet Cleaners Ltd.	290 Old Weston Rd.	250 - 500
Canada Packers	2200 St. Clair Ave. W.	1000 - 1500
Canadian Dressed Meats	109 Ryding Ave.	100 - 250
Central Bakery	130 Cawthra Ave.	100 - 250
CN CP Telecommunications	500 Keele St.	100 - 250
Coca-Cola Ltd.	81 Turnberry Ave.	100 - 250
Consolidated Bottle	77 Union St.	100 - 250
Grace Meat Packers	70 Glen Scarlet Rd.	100 - 250
Maple Leaf Mills Ltd.	43 Junction Rd.	100 - 250
National Rubber Co Ltd	35 Cawthra Ave.	250 - 500
Phantom	207 Weston Rd.	250 - 500
Star Valenti	123 Union St.	250 - 500
Terrazzo Mosaic Tile	900 Keele St.	100 - 250

Industrial Areas & Assessment Blocks

Stockyards **B**



Area C Central-West

Zoning	Official Plan
I2 D2	Restricted Industrial Area
I3 D2	Restricted Industrial Area
C2 V2	Area of Industry
C3 V2	Area of Industry
C3 V3	Area of Industry

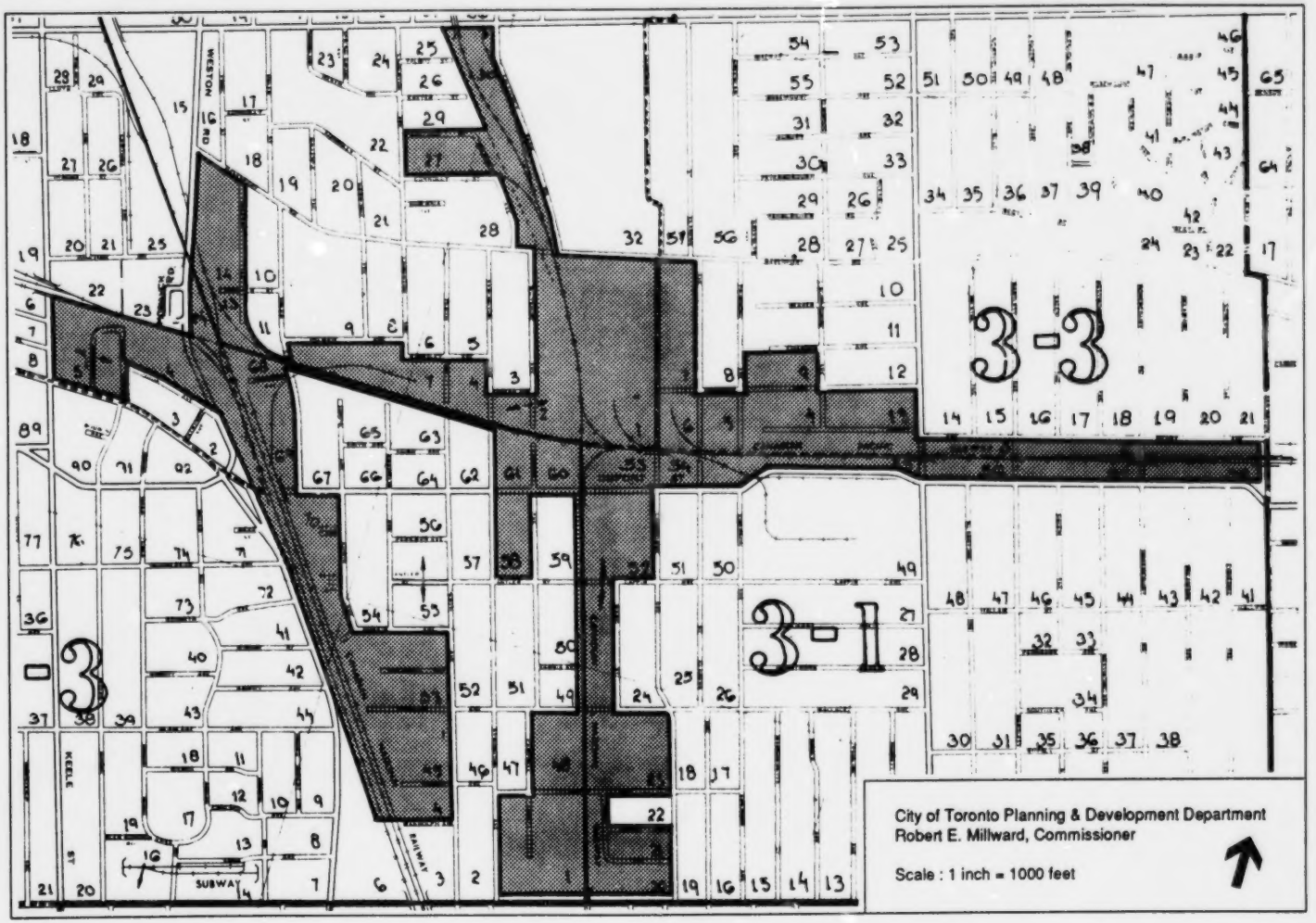
Number of Assessment Blocks	41
Acres	183
Number of Establishments	303
Total Employment	6410
Industrial Employment	5212
% Manufacturing	62
% Other Industrial	20
% Non-Industrial	18

Establishments

with 100 Employees +	Address	Employment Range
American Standard	1401 Dupont St.	250 - 500
American Standard	80 Wallace Ave.	100 - 250
Anchor Cap & Closure Corp.	275 Wallace Ave.	250 - 500
Canada Packers Inc.	60 Paton Rd.	100 - 250
Canadian Tire Corporation	403 Keele St.	100 - 250
D'Orlan Jewellers Ltd.	195 Old Weston Rd.	100 - 250
Daisy Decorative Products	108 Brandon Ave.	100 - 250
Davis Textiles Ltd.	187 Geary Ave.	100 - 250
Dominion Hosiery Mills Inc.	224 Wallace Ave.	100 - 250
Jane Parker Bakery Ltd.	135 Laughton Ave.	250 - 500
L Davis Textiles Co. Ltd.	1345 Dufferin St.	100 - 250
Lancio-Bravo Foods	58 Hook Ave.	250 - 500
National Knitting Mills Co.	300 Campbell Ave.	100 - 250
National Rubber Co.	386 Symington Ave	250 - 500
Toronto Transit Commission	640 Lansdowne Ave.	500 - 750
Triumph Entertainment Corp.	940 Lansdowne Ave.	100 - 250
Visioneering Corp.	224 Wallace Ave.	100 - 250

Industrial Areas & Assessment Blocks

Central West C



Area D South-West

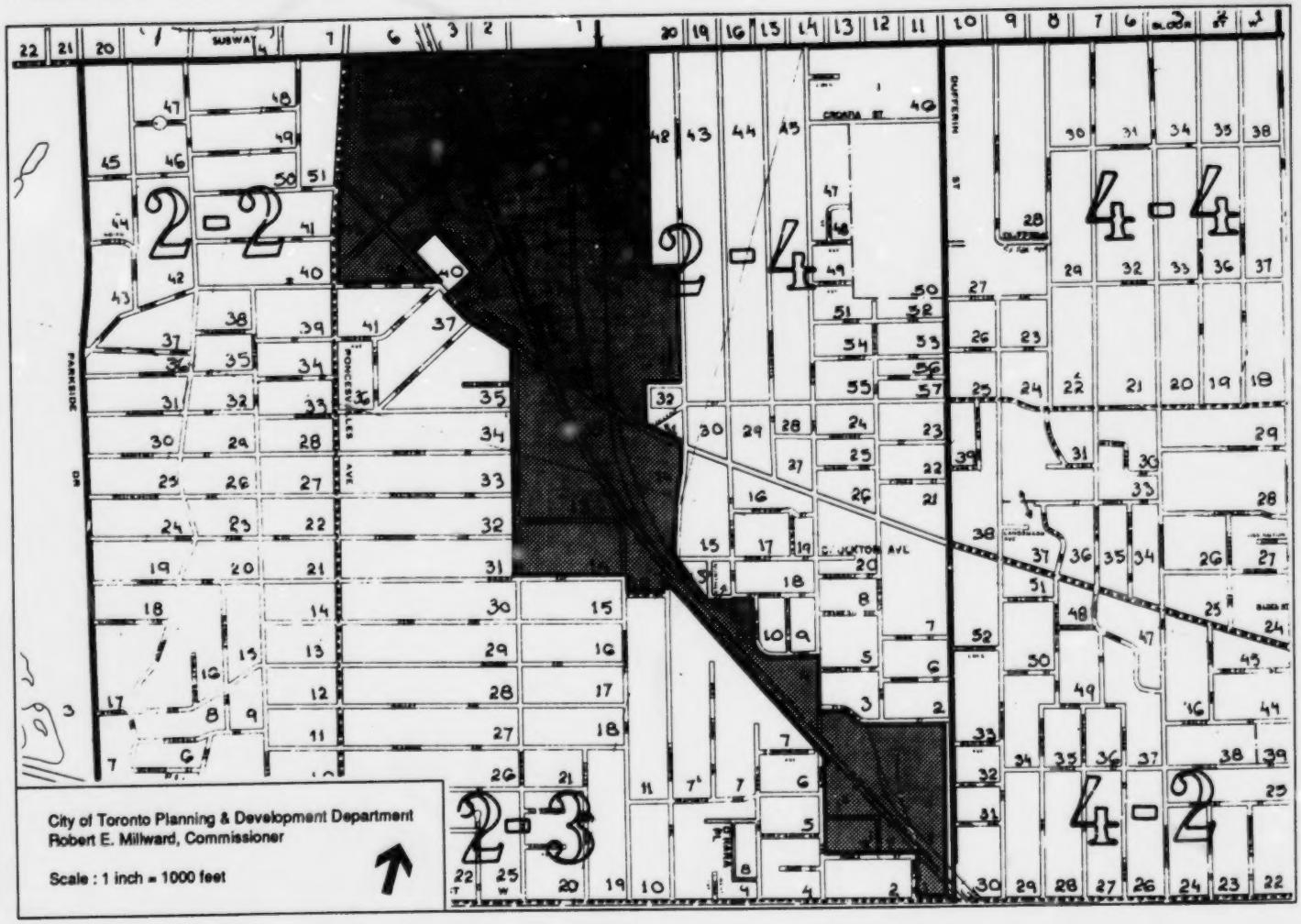
Zoning	Official Plan
I2 D2	Restricted Industrial Area
C2 V2	Area of Industry
C3 V2	Area of Industry

Number of Assessment Blocks	19
Acres	115.3
Number of Establishments	326
Total Employment	4718
Industrial Employment	2807
% Manufacturing	50
% Other Industrial	10
% Non-Industrial	40

Establishments with 100 Employees +	Address	Employment Range
Aluminum Goods Ltd.	158 Sterling Rd.	250 - 500
Dept. of Parks and Recreation	2238 Dundas St. W.	250 - 500
Famous Swiss Emblems	77 Brook Ave.	100 - 250
Knob Hill Farms Limited	214 Lansdowne Ave.	100 - 250
Loblaws Limited	2280 Dundas St. W.	100 - 250
Moloney Electric Co.	213 Sterling Rd.	100 - 250
Oshawa Group	2290 Dundas St. W.	100 - 250
Rowntree Mackintosh Canada	72 Sterling Rd.	250 - 500
Rowntree Mackintosh Canada	72 Sterling Rd.	100 - 250
Scythes Inc.	128 Sterling Rd.	100 - 250
Work Wear Corp.	35 Golden Ave.	100 - 250

Industrial Areas & Assessment Blocks

South West **D**



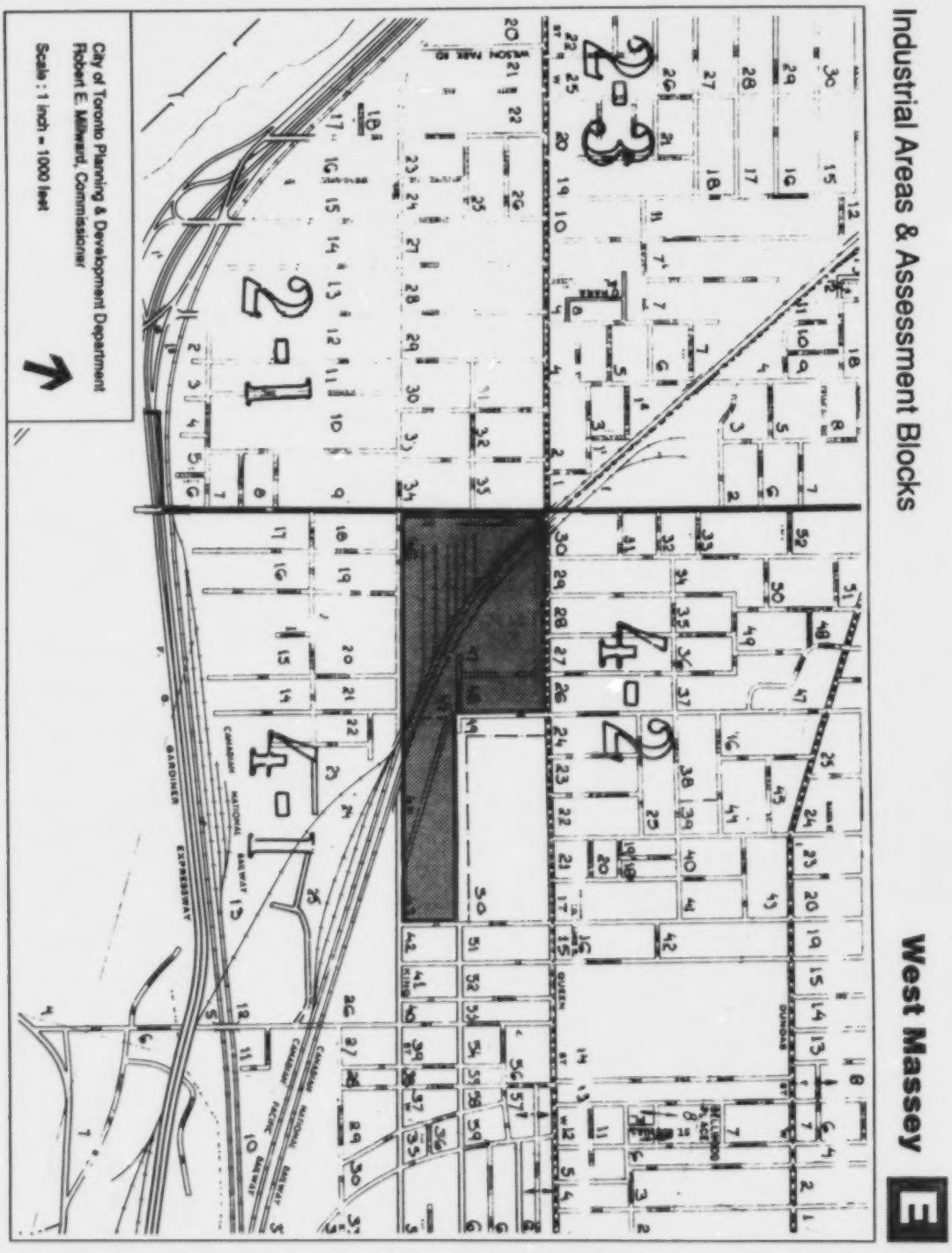
Area E Massey West

Zoning	Official Plan
I2 D2	Restricted Industrial Area
I2 D3	Restricted Industrial Area
I2 D5	Restricted Industrial Area

Number of Assessment Blocks	6
Acres	29.8
Number of Establishments	46
Total Employment	756
Industrial Employment	323
% Manufacturing	33
% Other Industrial	10
% Non-Industrial	57

Establishments with 100 Employees +

	Address	Employment Range
City of Toronto	1116 King St. W.	100 - 250


Industrial Areas & Assessment Blocks
West Massey
E
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
GARDINER EXPRESSWAY
CANADIAN NATIONAL RAILWAY
CANADIAN PACIFIC RAILWAY
QUEEN ST
DUNDAS ST
KING ST

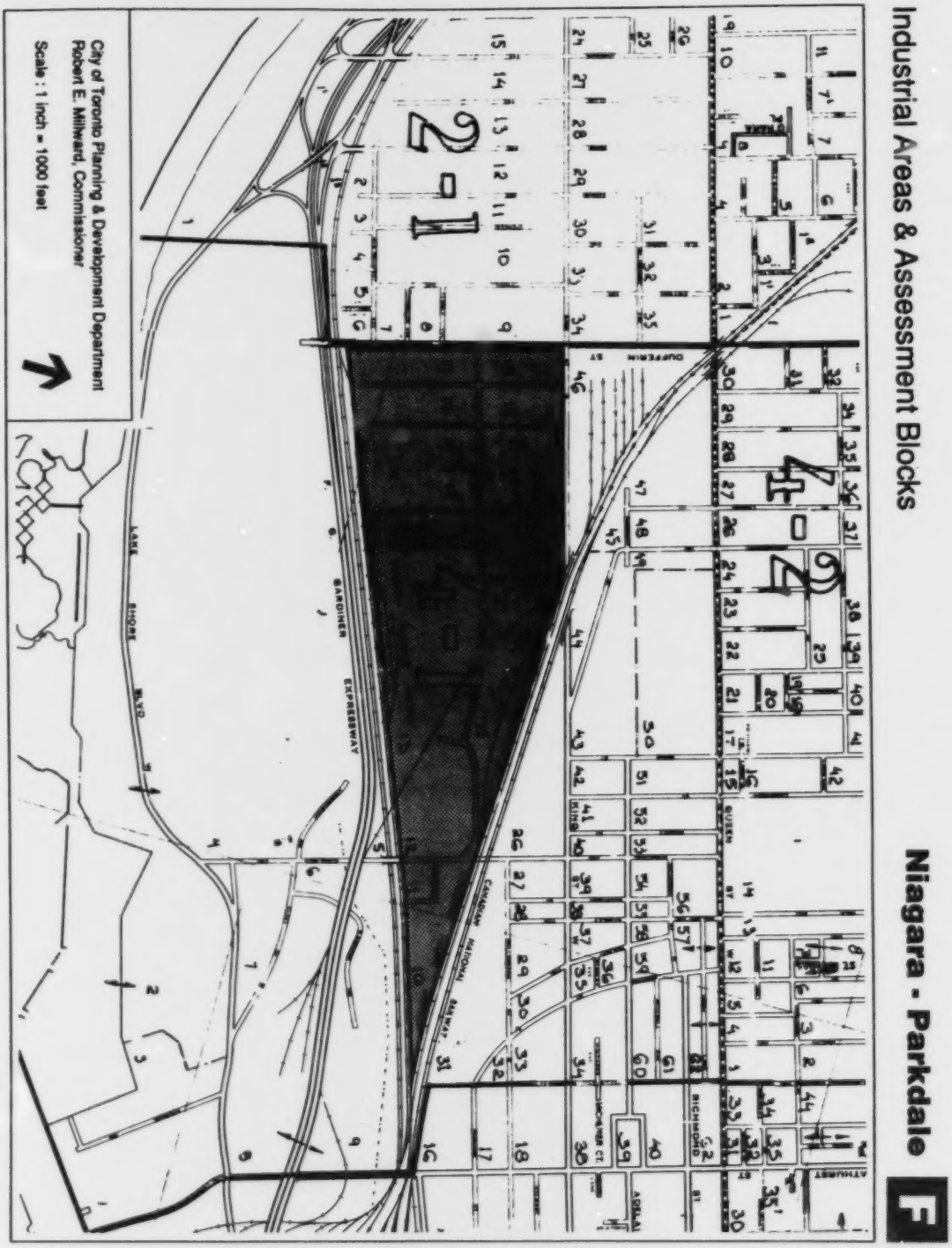
Area F Niagara Parkdale

Zoning	Official Plan
I3 D7	General Industrial Area

Number of Assessment Blocks	16
Acres	90.5
Number of Establishments	409
Total Employment	5280
Industrial Employment	3892
% Manufacturing/Warehouse	56
% Other Industrial	18
% Non-Industrial	26

Establishments

With 100 Employees +	Address	Employment Range
Baker Gurney McLaren Press	7 Hanna Ave.	100 - 250
Barrymore Carpet Inc.	190 Liberty St.	100 - 250
Barrymore Furniture Co. Ltd.	109 Atlantic Ave.	100 - 250
Dempster's Toastmaster	2 Fraser Ave.	250 - 500
Inglis Ltd.	14 Strachan Ave.	500 - 750
Irwin Toy Ltd.	43 Hanna Ave.	100 - 250
Metro Toronto Police Dept.	45 Strachan Ave.	100 - 250
Nelvana	24 Atlantic Ave.	250 - 500
Nightingale Industries	9 Hanna Ave.	100 - 250
Public Storage	2 Jefferson Ave.	500 - 750
Warren K. Cook Ltd.	7 Fraser Ave.	100 - 250

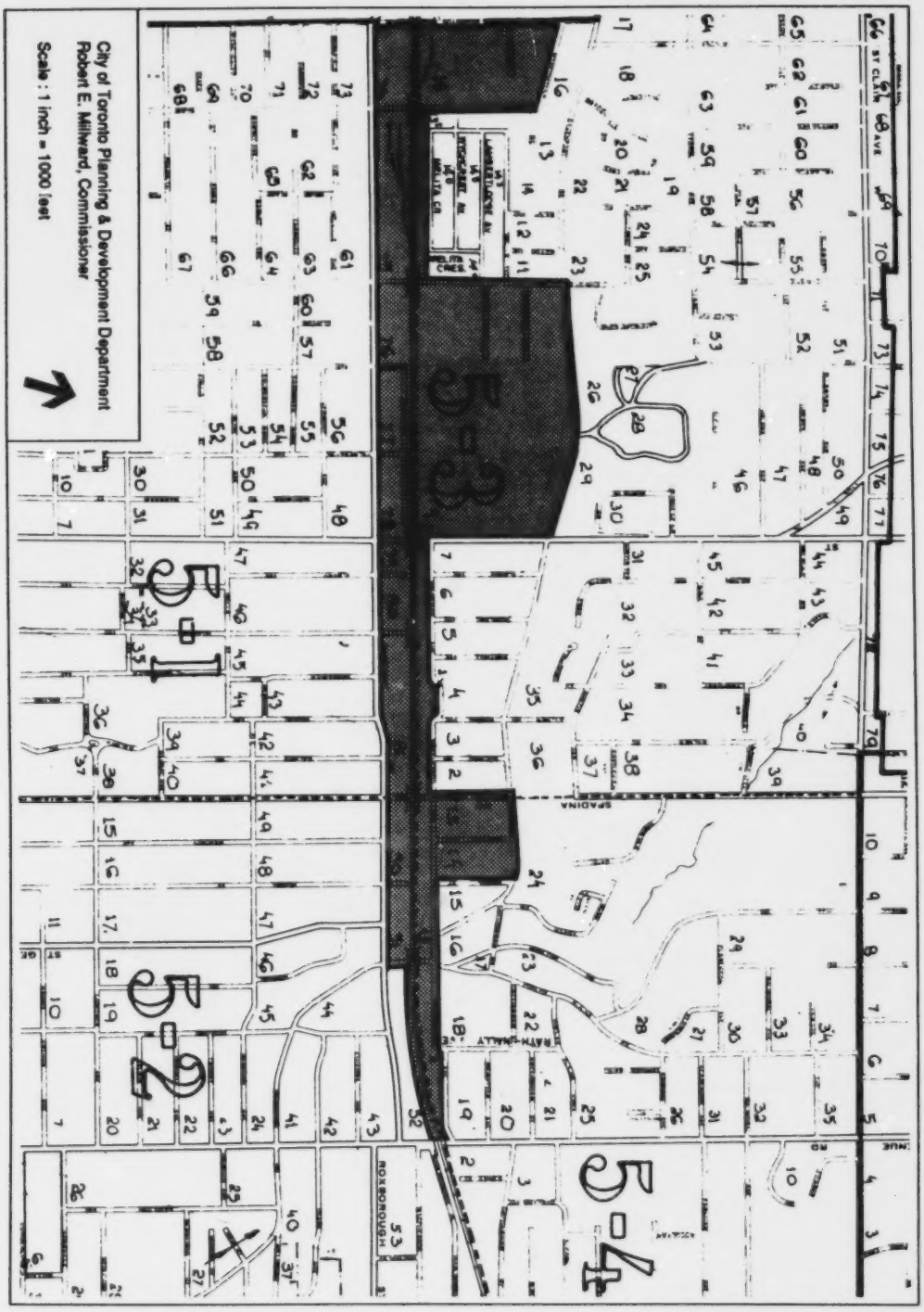

Industrial Areas & Assessment Blocks
Niagara - Parkdale
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
GARDINER EXPRESSWAY
LAKE SHORE BLVD
CANADIAN NATIONAL RAILWAY
DUFFERIN ST
QUEEN ST
RICHMOND
ATHOLSTAN
ARGYLE
RICHMOND CT

Area G Dupont East

Zoning	Official Plan
I1 D1	Permissible Industry
I1 D3	Permissible Industry
C2 V2	General Use
C3 V2	General Use
	Area of Industry

Number of Assessment Blocks	16
Acres	90.6
Total Establishments	186
Total Employment	5535
Industrial Employment	1545
% Manufacturing	12
% Other Industrial	16
% Non-Industrial	72

Establishments with 100 Employees +	Address	Employment Range
Bell Canada	1090 Shaw St.	100 - 250
Canadian Linen Supply Co. Ltd.	1145 Ossington Ave.	100 - 250
Castleview Wychwood Towers	351 Christie St.	500 - 750
Toronto Hydro Electric System	700 Huron St.	250 - 500
Toronto Transit Commission	1130 Bathurst St.	2000 - 2500
Weston Bakeries Ltd.	650 Dupont St.	250 - 500


Industrial Areas & Assessment Blocks
East Dupont
G
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
511
512
513
514

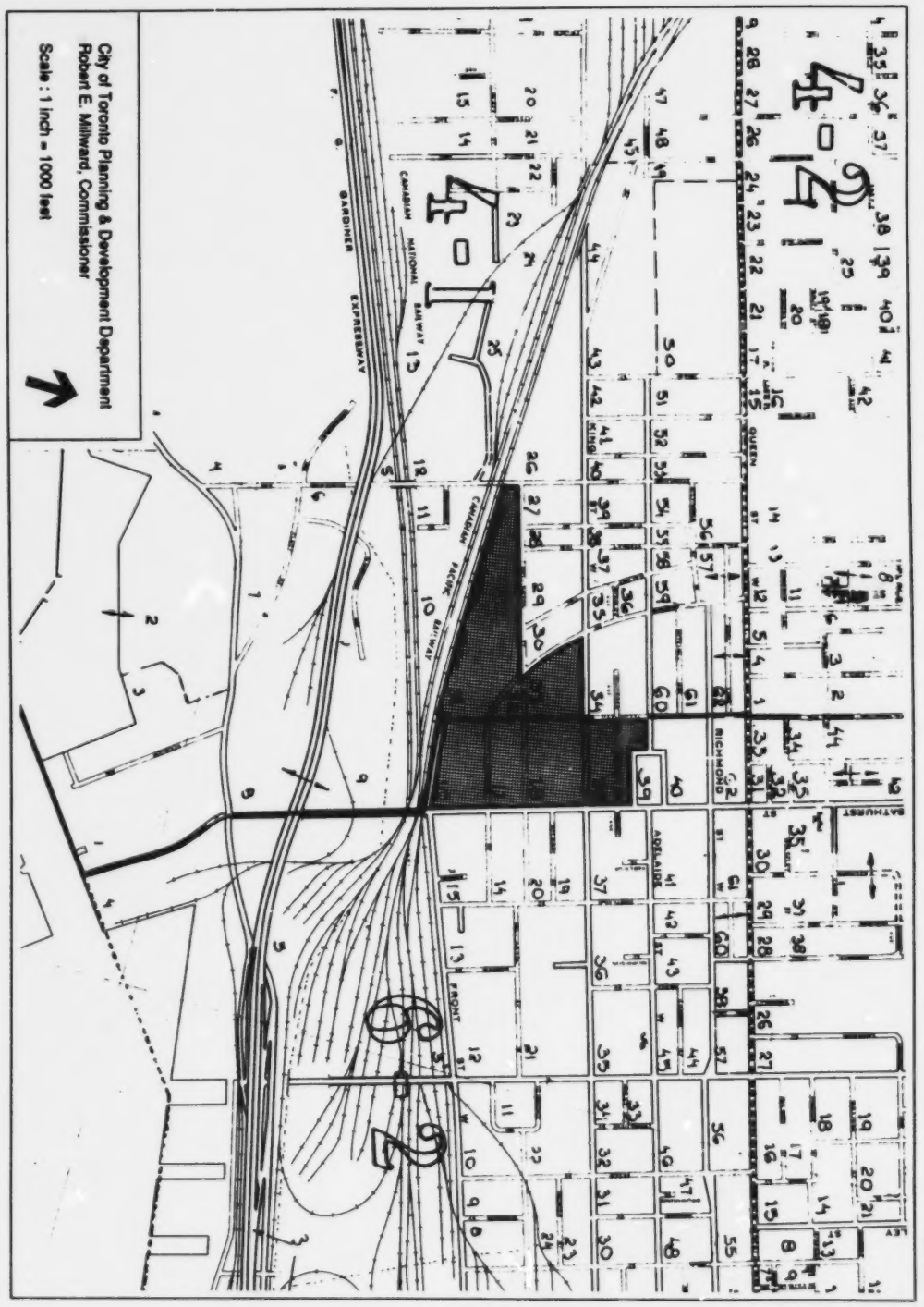
Area H Niagara

Zoning	Official Plan
I1 D3	Mixed Industrial-Residential Area
I2 D5	Restricted Industrial Area

Number of Assessment Blocks	7
Acres	36.9
Number of Establishments	233
Total Employment	2786
Industrial Employment	2085
% Manufacturing/Warehouse	50
% Other Industrial	25
% Non-Industrial	25

Establishments

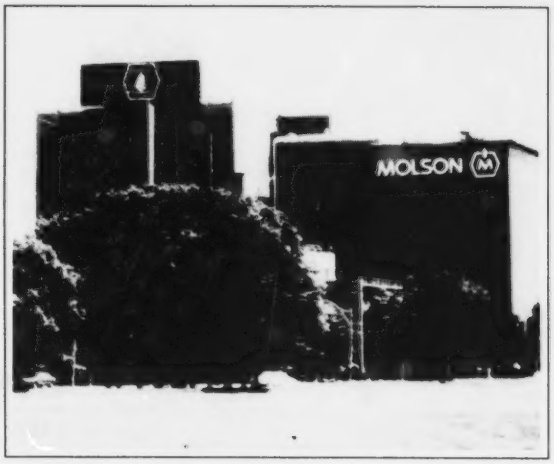
with 100 Employees +	Address	Employment Range
Monaco Group Inc. (Alfred Sung)	720 King St. W.	100 - 250
Monaco Group Inc. (Alfred Sung)	720 King St. W.	100 - 250
Quality Meat Packers Ltd.	2 Tecumseth St.	250 - 500
Sea Queen	720 King St. W.	100 - 250
Toronto Abattoirs Ltd.	2 Tecumseth St.	100 - 250


Industrial Areas & Assessment Blocks
Niagara
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
GARDINER EXPRESSWAY
CANADIAN NATIONAL RAILWAY
CANADIAN PACIFIC RAILWAY
QUEEN ST
KING
RICHMOND
ADELAIDE
FRONT

Area I Fleet Street

Zoning	Official Plan
IC D3 N1.5	General Use Area
IC D4 N1.5	General Use Area

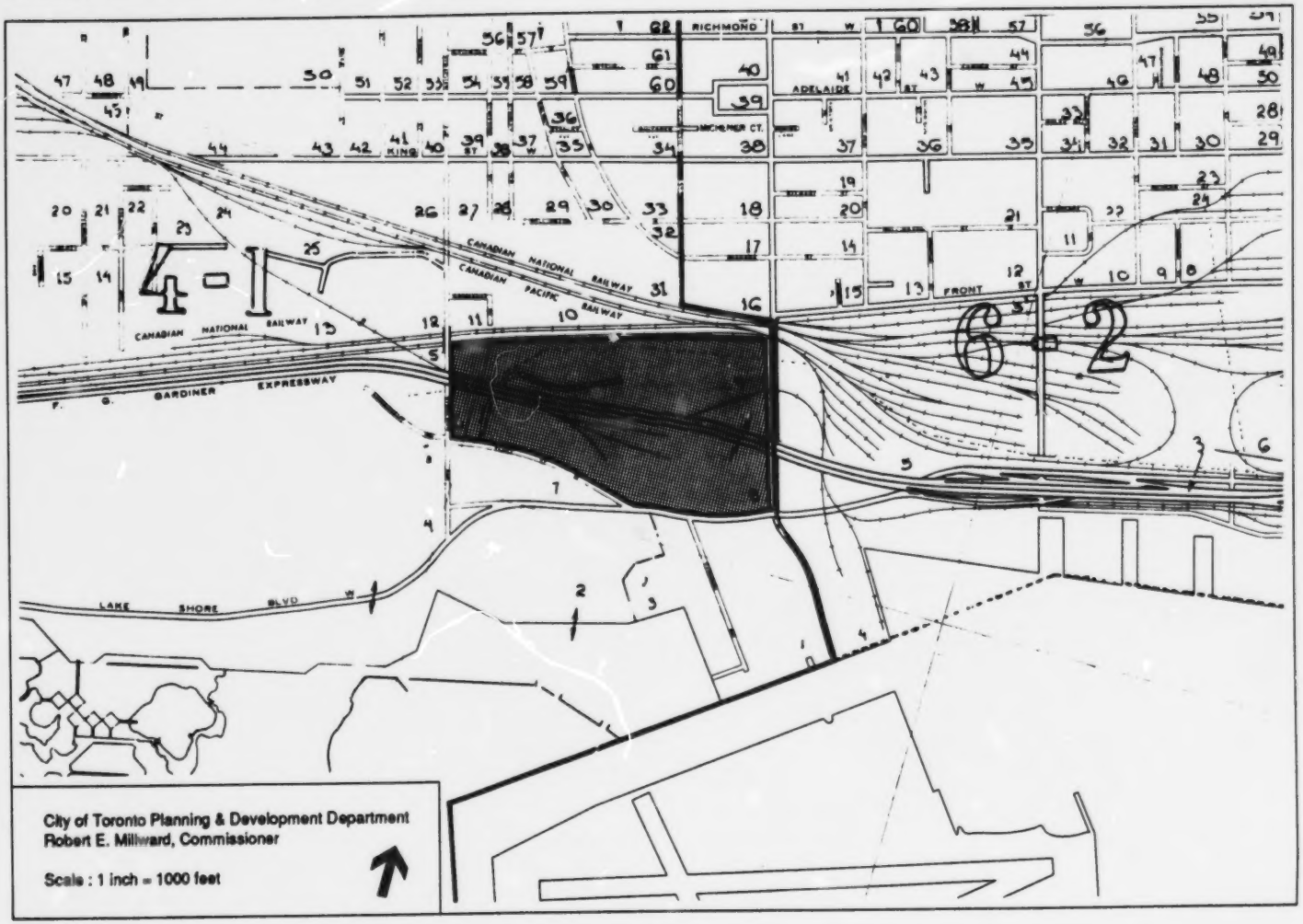
Number of Assessment Blocks	3
Acres	46.8
Number of Establishments	6
Total Employment	1027
Industrial Employment	710
% Manufacturing	69
% Other Industrial	0
% Non-Industrial	31



Establishment with 100 Employees +	Address	Employment Range
Molson's Brewery	640 Fleet St.	750 - 1000

Industrial Areas & Assessment Blocks

Fleet Street 1



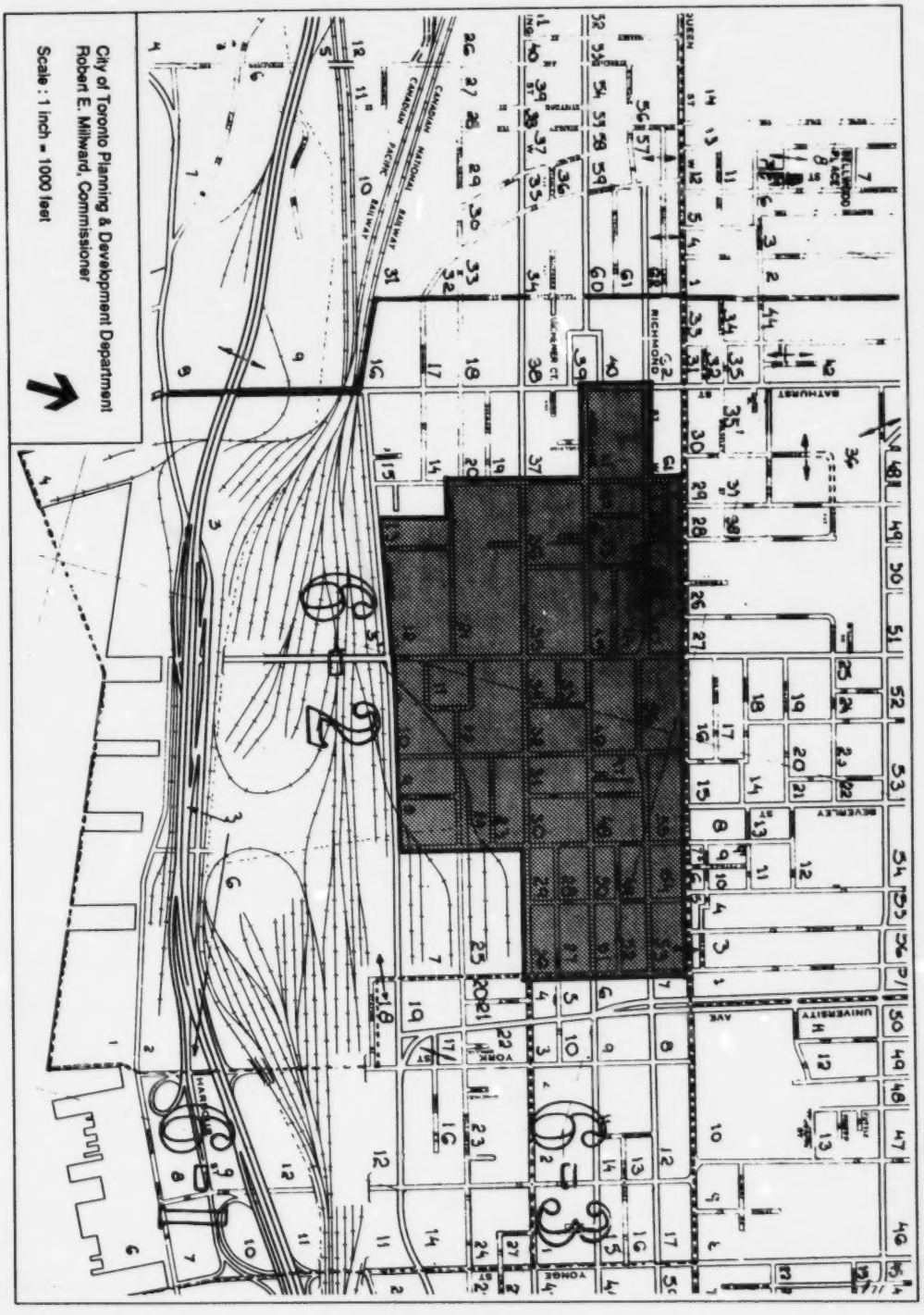
Area J King-Spadina

Zoning	Official Plan
I2 D5	Restricted Industrial Area
I2 D7	Restricted Industrial Area
I3 D7	Restricted Industrial Area

Number of Assessment Blocks	39
Acres	115.6
Number of Establishments	1692
Total Employment	19110
Industrial Employment	10151
% Manufacturing	30
% Other Industrial	23
% Non-Industrial	47

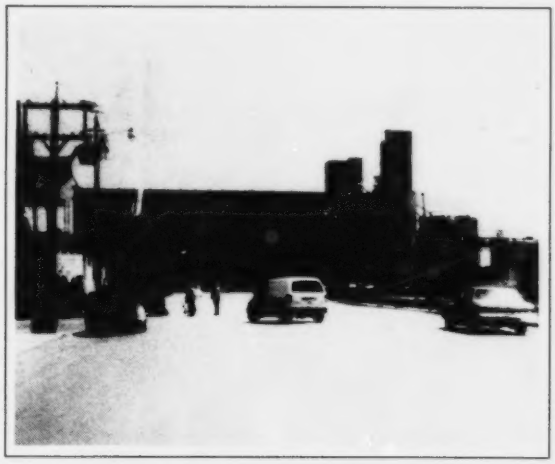
Establishments with 100 Employees +

Establishments with 100 Employees +	Address	Employment Range
City TV Ltd.	295 Queen St. W.	250 - 500
Cooper & Beatty Ltd.	24 Spadina Ave.	100 - 250
Dover Corporation (Canada) Ltd.	126 John St.	250 - 500
ETAC Industries	582 King St. W.	100 - 250
Film House Group Ltd.	380 Adelaide St. W.	100 - 250
Garfields Ltd.	468 Wellington St. W.	100 - 250
Gordon-Daly Grenadier Securities	224 Richmond St. W.	100 - 250
Inter Base Inc.	240 Richmond St. W.	100 - 250
Mac Mor of Canada Ltd.	366 Adelaide St. W.	100 - 250
McGregor Industries Inc.	24 Spadina Ave.	250 - 500
Mister Leonard Inc.	530 Adelaide St. W.	250 - 500
Mister Leonard Inc.	431 King St. W.	250 - 500
Network Studios Inc.	117 Peter St.	250 - 500
Nu Mode Dress Co. Ltd.	530 Adelaide St. W.	100 - 250
Sunwheel Bicycle Courier	19 Charlotte St.	100 - 250
Symons International Group	212 King St. W.	100 - 250
The Globe & Mail Company	440 Front St. W.	1000 - 1500
Yomen Securities	296 Adelaide St. W.	500 - 750
Zeidler Roberts Partnership	315 Queen St. W.	100 - 250


Industrial Areas & Assessment Blocks
King - Spadina
J
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
QUEEN ST
RICHMOND
BATHURST
BELLWOOD PL. AVE
SPADINA AVE
UNIVERSITY
YONGE
CANADIAN NATIONAL RAILWAY
CANADIAN PACIFIC RAILWAY
HARBOUR

Area K East Bayfront

Zoning	Official Plan
I2 D3 N0.5	Restricted Industrial Area
I3 D3	Restricted Industrial Area

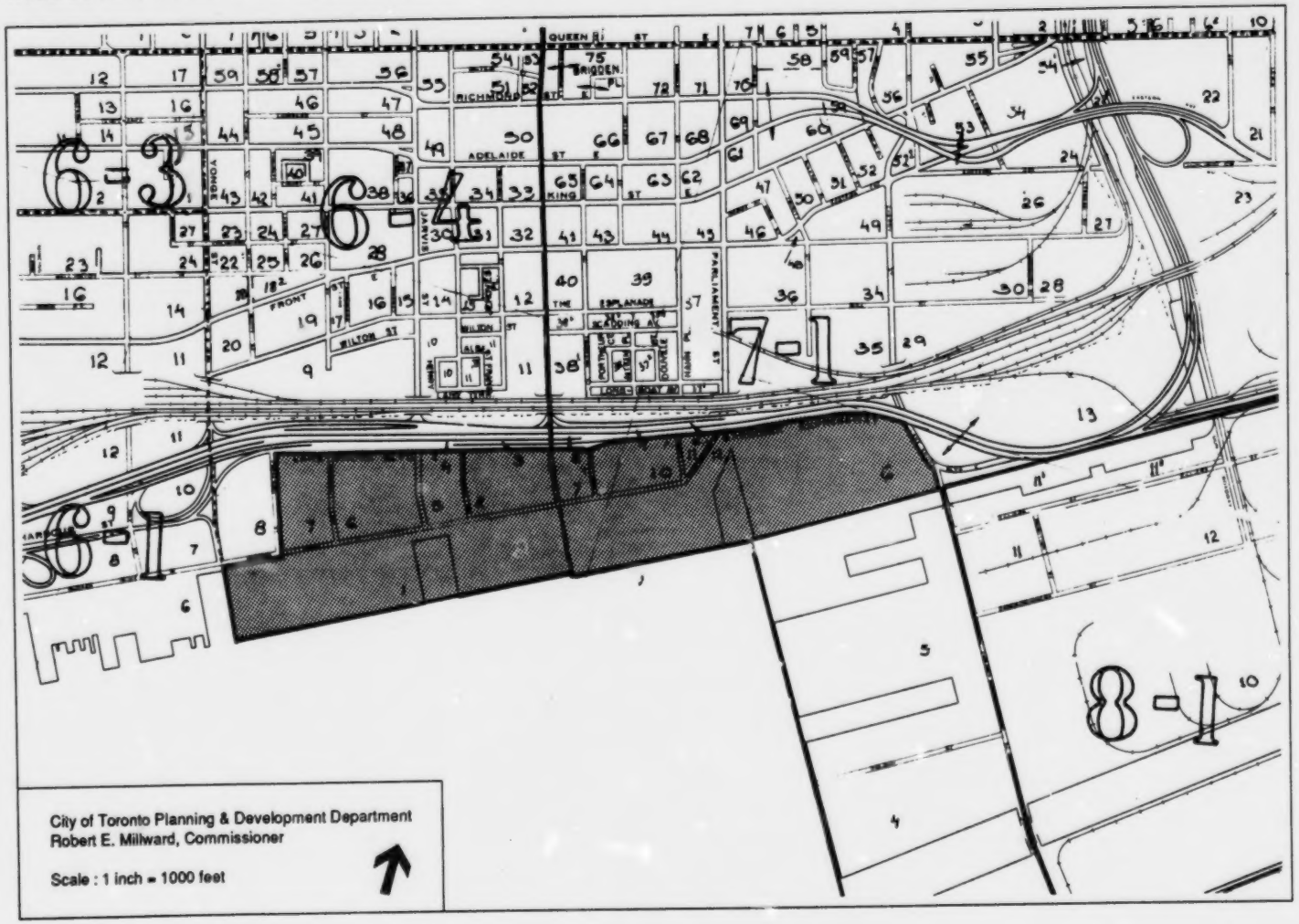


Number of Assessment Blocks	9
Acres	113.9
Number of Establishments	69
Total Employment	2615
Industrial Employment	1575
% Manufacturing/Warehouse	43
% Other Industrial	18
% Non-Industrial	39

Establishments with 100 Employees +	Address	Employment Range
Canpar	61 Queens Quay E.	250 - 500
Chas. Abel Photo Serivce	5 Lower Sherbourne	250 - 500
Liquor Control Board of Ont.	95 Lake Shore Blvd. E.	100 - 250
Liquor Control Board of Ont.	55 Lake Shore Blvd. E.	100 - 250
Ontario Provincial Police	125 Lake Shore Blvd. E.	100 - 250
Redpath Sugars Ltd.	95 Queens Quay E.	250 - 500

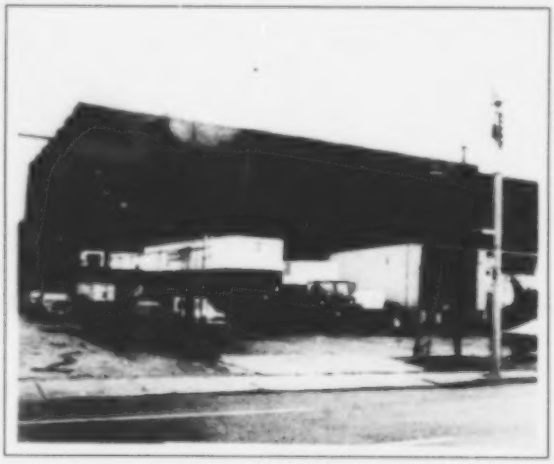
Industrial Areas & Assessment Blocks

East Bayfront K



Area L King-Parliament

Zoning	Official Plan
I2 D7	Restricted Industrial Area

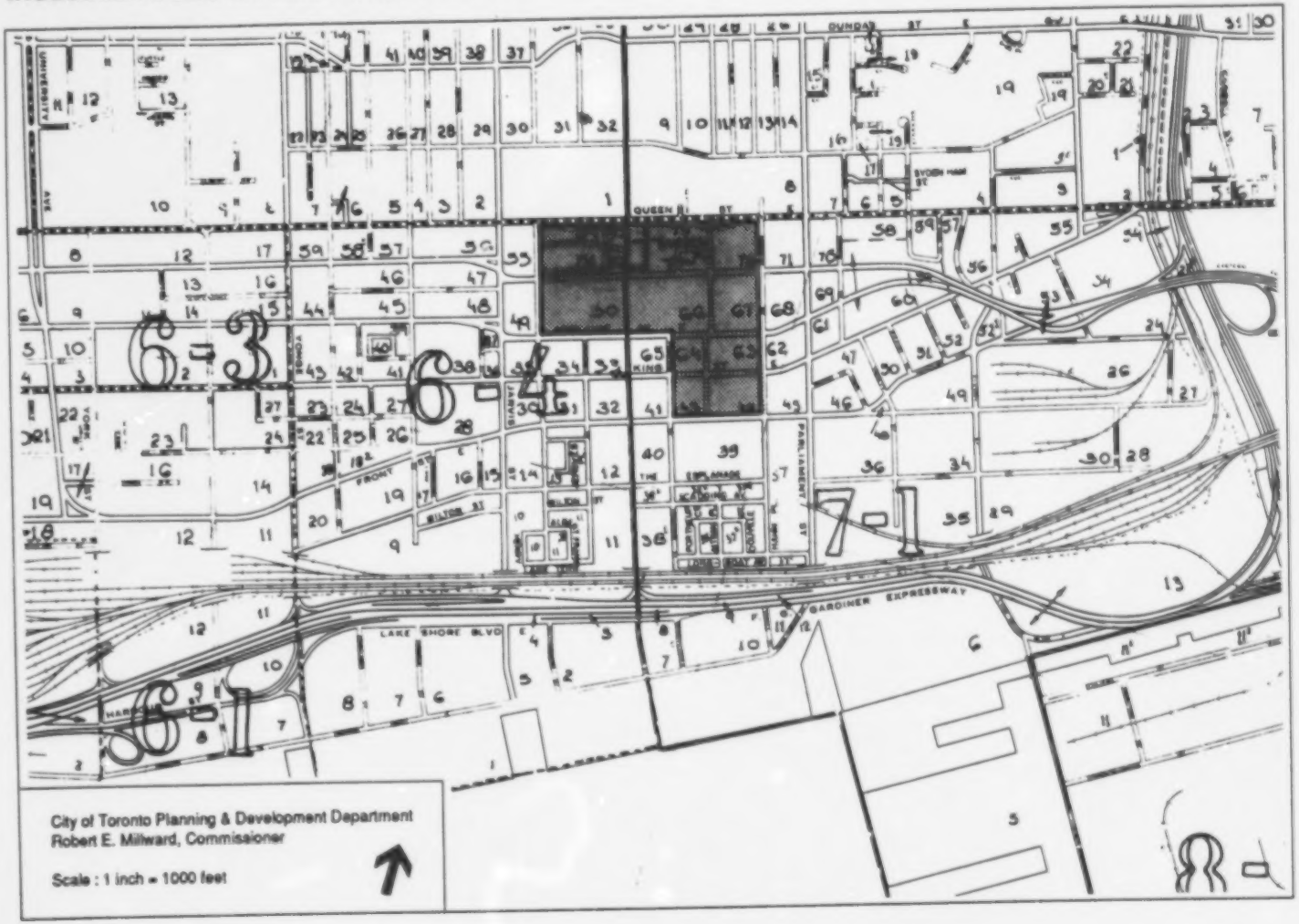


Number of Assessment Blocks	13
Acres	30
Number of Establishments	288
Total Employment	4203
Industrial Employment	2459
% Manufacturing	13
% Other Industrial	46
% Non-Industrial	41

Establishments with 100 Employees +	Address	Employment Range
Benjamin Film Laboratories	247 Richmond St. E.	100 - 250
Carrier Footware (1980) Ltd.	90 Ontario St.	100 - 250
Imperial Optical Co. Ltd.	90 Sherbourne St.	100 - 250
Imperial Optical Co. Ltd.	80 Sherbourne St.	100 - 250
Rous Mann Brigdens Ltd.	12 Bridgen Pl.	100 - 250
The Toronto Sun	333 King St. E.	1000 -1500

Industrial Areas & Assessment Blocks

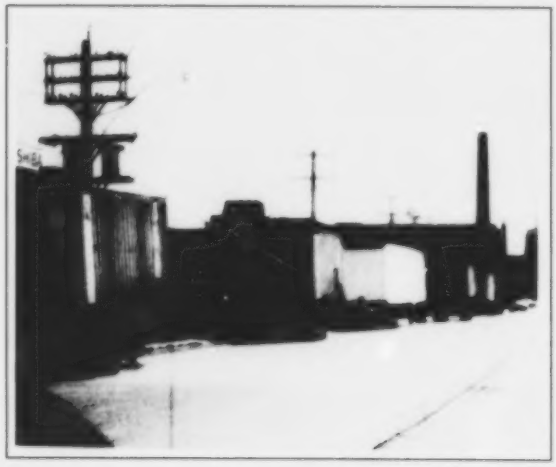
King - Parliament L



Area M West Don

Zoning	Official Plan
I2 D5	Restricted Industrial Area
I3 D7	General Industrial Area

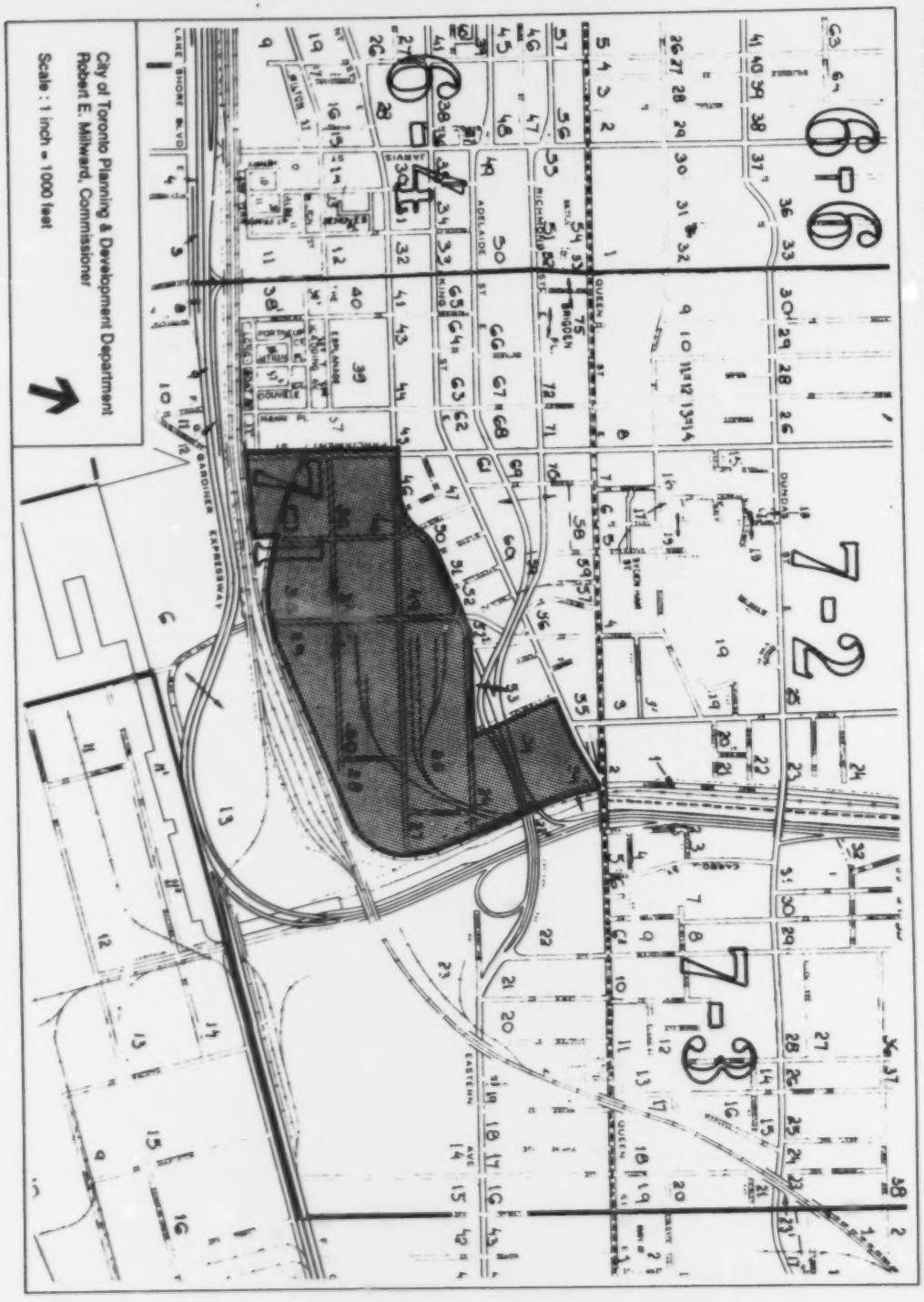
Number of Assessment Blocks	12
Acres	66
Number of Establishments	62
Total Employment	1301
Industrial Employment	773
% Manufacturing	36
% Other Industrial	23
% Non-Industrial	41



Establishments with 100 Employees +	Address	Employment Range
---	---	---

Industrial Areas & Assessment Blocks

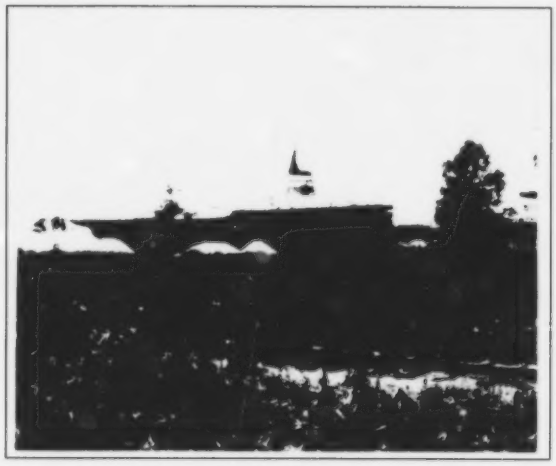
West Don



Area N Port

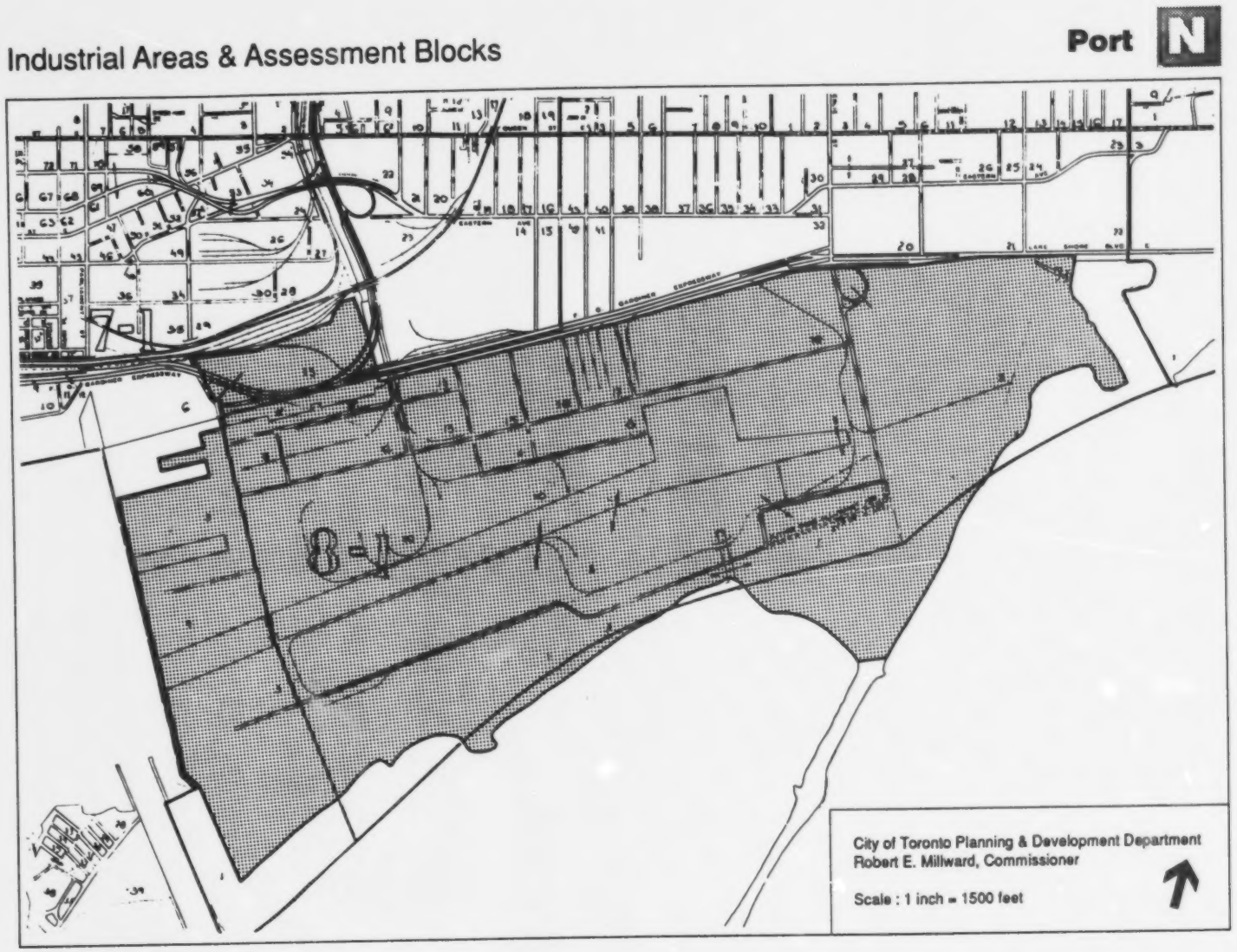
Zoning	Official Plan
I2 D2	Restricted Industrial Area
I3 D2	General Industrial Area
I4 D2	Heavy Industrial Area
IC D2 N0.5	General Use Area

Number of Assessment Blocks	23
Acres	1000
Number of Establishments	114
Total Employment	4328
Industrial Employment	3095
% Manufacturing	52
% Other Industrial	20
% Non-Industrial	28



Establishments with 100 Employees +	Address	Employment Range
Brewer's Warehousing Co. Ltd.	1015 Lake Shore Blvd. E.	250 - 500
Canada Post Corporation	600 Commissioners St.	100 - 250
CIMCO	65 Villiers St.	100 - 250
CIMCO (Cdn. Ice Machine)	65 Villiers St.	100 - 250
CP Express & Transport Co. Ltd.	150 Commissioners St.	100 - 250
Grey Coach Lines Ltd.	580 Commissioners St.	100 - 250
Main Treatment Plant	1313 Lake Shore Blvd. E.	250 - 500
Metro Works Central Services	545 Commissioners St.	100 - 250
Paper Board Industries Corp.	495 Commissioners St.	100 - 250
Shell Canada Ltd.	500 Commissioners St.	100 - 250

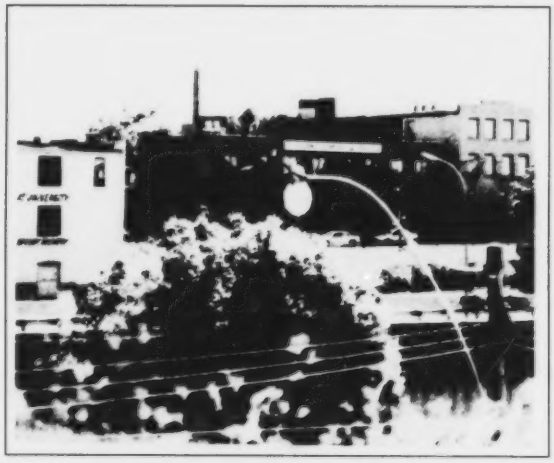
Industrial Areas & Assessment Blocks



Area O Queen-River

Zoning	Official Plan
I2 D3	Restricted Industrial Area

Number of Assessment Blocks	12
Acres	37.6
Number of Establishments	136
Total Employment	2415
Industrial Employment	1203
% Manufacturing	38
% Other Industrial	12
% Non-Industrial	50

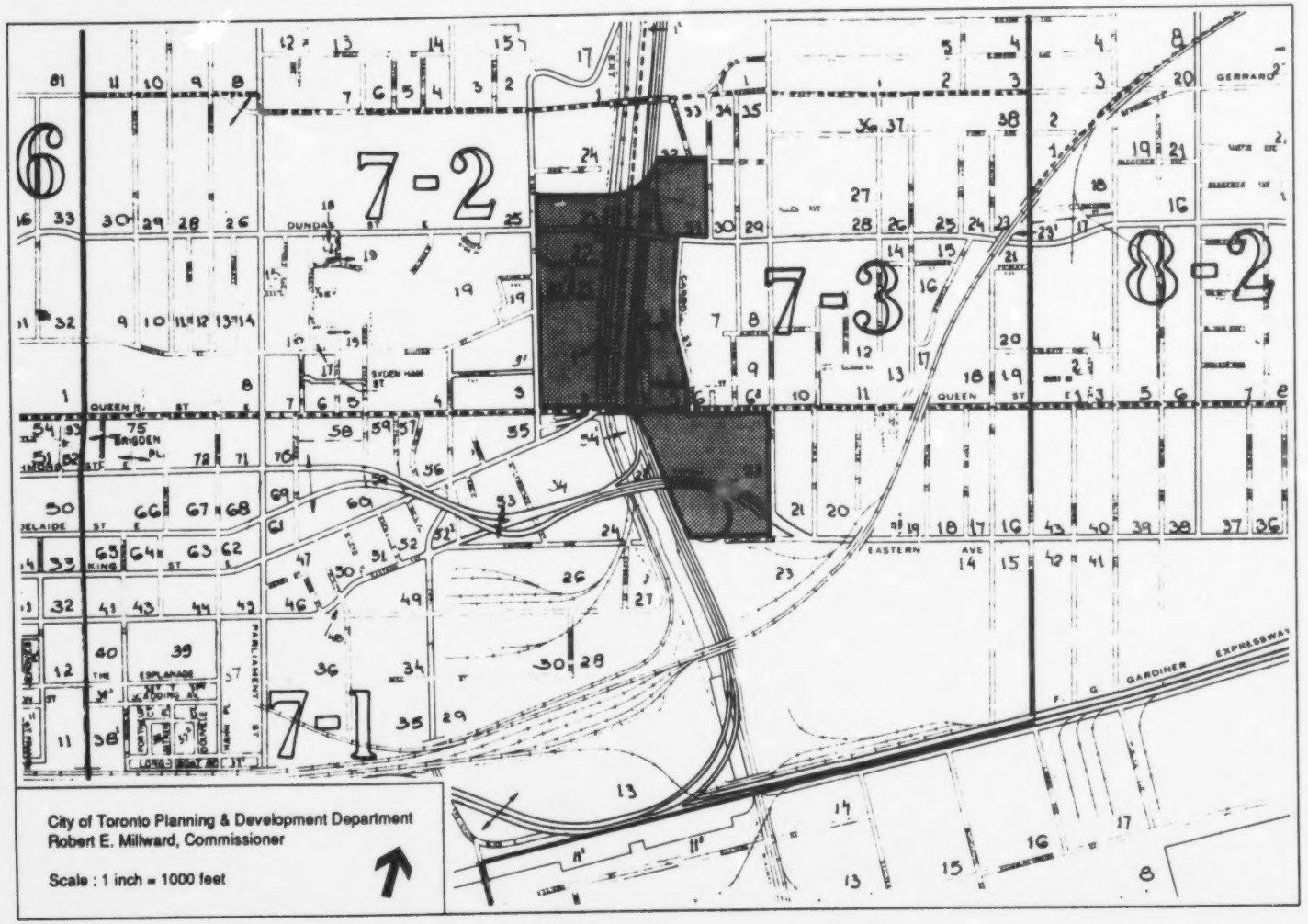


Establishments

with 100 Employees +	Address	Employment Range
Accurate Distributing Co.	655 Queen St. E.	100 - 250
City of Toronto	149 River St.	100 - 250
HA Kidd & Co. Ltd.	2 Mark St.	100 - 250
Mac Kay Specialties Can. Ltd.	33 Labatt Ave.	100 - 250
Northern Miner Press	7 Labatt Ave.	100 - 250
Sainthill Levine Uniforms	100 Broadview Ave.	100 - 250
Tippet Richardson Ltd.	79 East Don Rdwy.	250 - 500

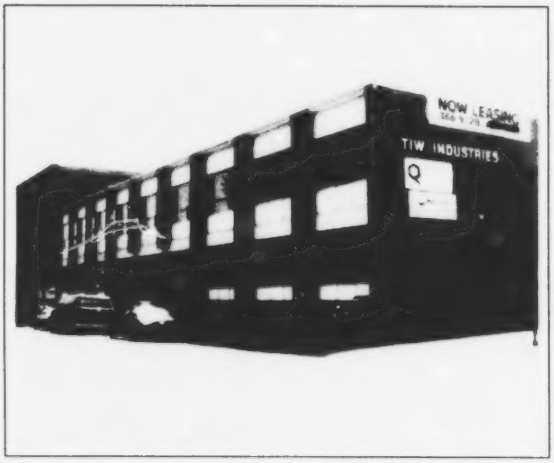
Industrial Areas & Assessment Blocks

Queen - River O



Area P South of Eastern

Zoning	Official Plan
I2 D5	Restricted Industrial Area
I3 D5	General Industrial Area



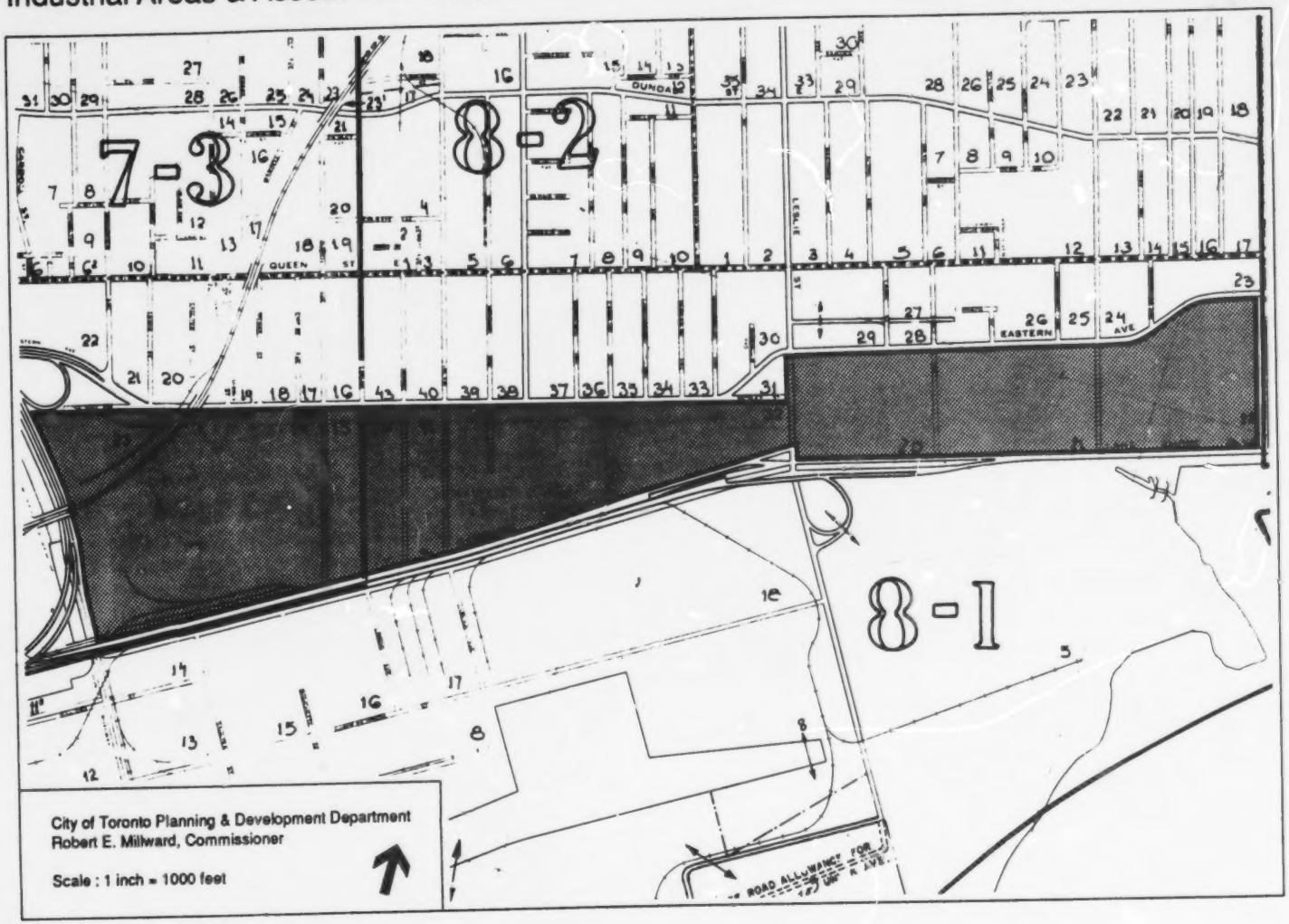
Number of Assessment Blocks	9
Acres	189
Number of Establishments	119
Total Employment	8530
Industrial Employment	4918
% Manufacturing	45
% Other Industrial	13
% Non-Industrial	42

Establishments

with 100 Employees +	**Address**	**Employment Range**
A R Clarke & Co. Ltd.	633 Eastern Ave.	100 - 250
Booth Avenue Hospital Laundry	30 Booth Ave.	100 - 250
Brink's Canada Ltd.	55 Logan Ave.	250 - 500
Canada Post Corp.	969 Eastern Ave.	3000 -3500
Canada Post Corp.	969 Eastern Ave.	100 - 250
Consumers' Gas Co. Ltd.	405 Eastern Ave.	100 - 250
Grafton Fraser Inc.	9 Sunlight Pk. Rd.	100 - 250
Lever Bros. Ltd.	1 Sunlight Pk. Rd.	250 - 500
Lever Bros. Ltd.	1 Sunlight Pk. Rd.	250 - 500
Loblaws Ltd.	23 Leslie St.	250 - 500
Loomis Armoured Car Ltd.	995 Eastern Ave.	100 - 250
Parks & Recreation	995 Eastern Ave.	100 - 250
Public Works Operations/ Sanitation	433 Eastern Ave.	500 - 750
Purolator Courier Inc.	20 Morse St.	250 - 500
Purloator Courier Inc.	11 Morse St.	100 - 250
The Canada Metal Co.	721 Eastern Ave.	250 - 500
Toronto Board of Education	849 Eastern Ave.	250 - 500
Toronto/Central Maintenance	843 Eastern Ave.	100 - 250

Industrial Areas & Assessment Blocks

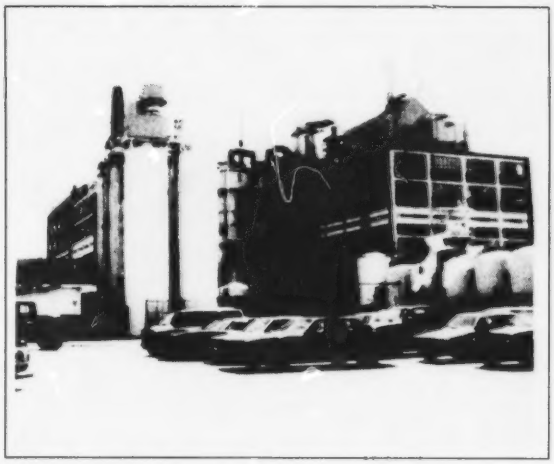
South of Eastern **P**



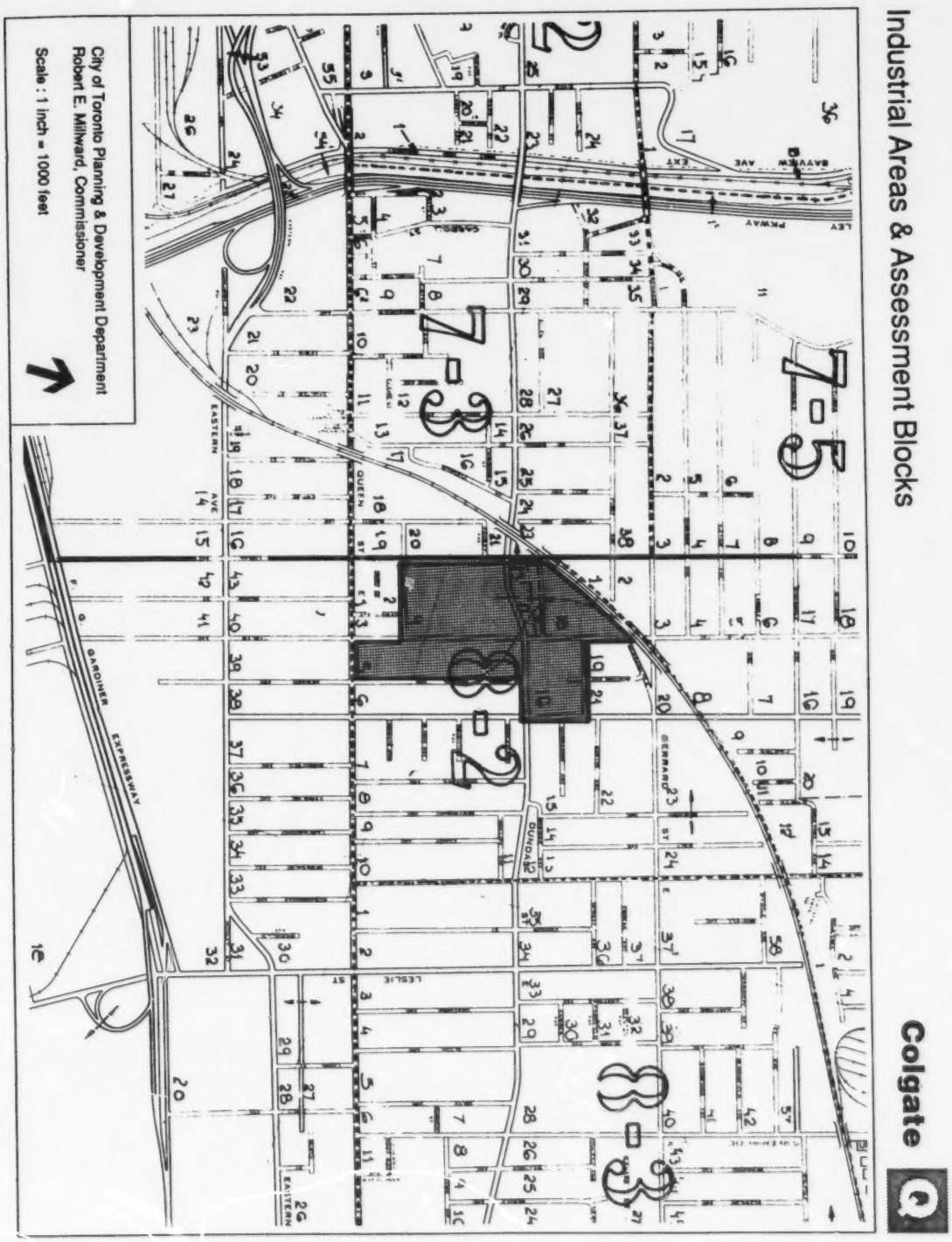
Area Q Colgate

Zoning	Official Plan
I2 D3	Restricted Industrial Area
I2 D5	Restricted Industrial Area

Number of Assessment Blocks	5
Acres	31.1
Number of Establishments	125
Total Employment	2755
Industrial Employment	2290
% Manufacturing	75
% Other Industrial	8
% Non-Industrial	17

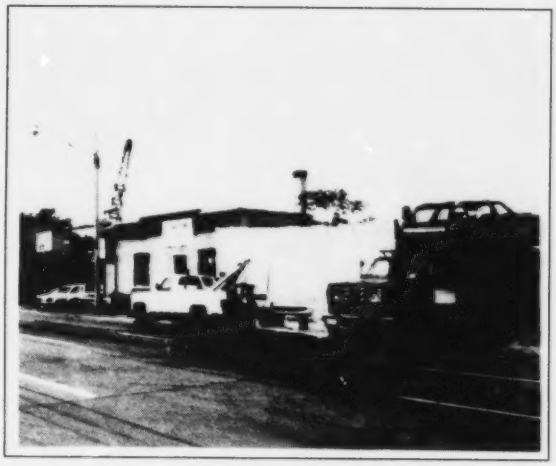


Establishments with 100 Employees +	Address	Employment Range
Colgate Palmolive	64 Colgate Ave.	100 - 250
Colgate Palmolive	64 Colgate Ave.	250 - 500
Diament Knitting Mills Ltd.	320 Carlaw Ave.	250 - 500
Lark Mfg. Inc.	345 Carlaw Ave.	100 - 250
Riviera Slacks Inc.	201 Carlaw Ave.	250 - 500
Singer Lighting Co. Ltd.	201 Carlaw Ave.	100 - 250


Industrial Areas & Assessment Blocks
Colgate
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
705
782
783
784
GARDINER EXPRESSWAY
EASTERN AVE
QUEEN ST
DUNDAS ST
GERRARD ST
LESLIE ST

Area R Leslie-Eastern

Zoning	Official Plan
I2 D2	Mixed Industrial-Residential Area

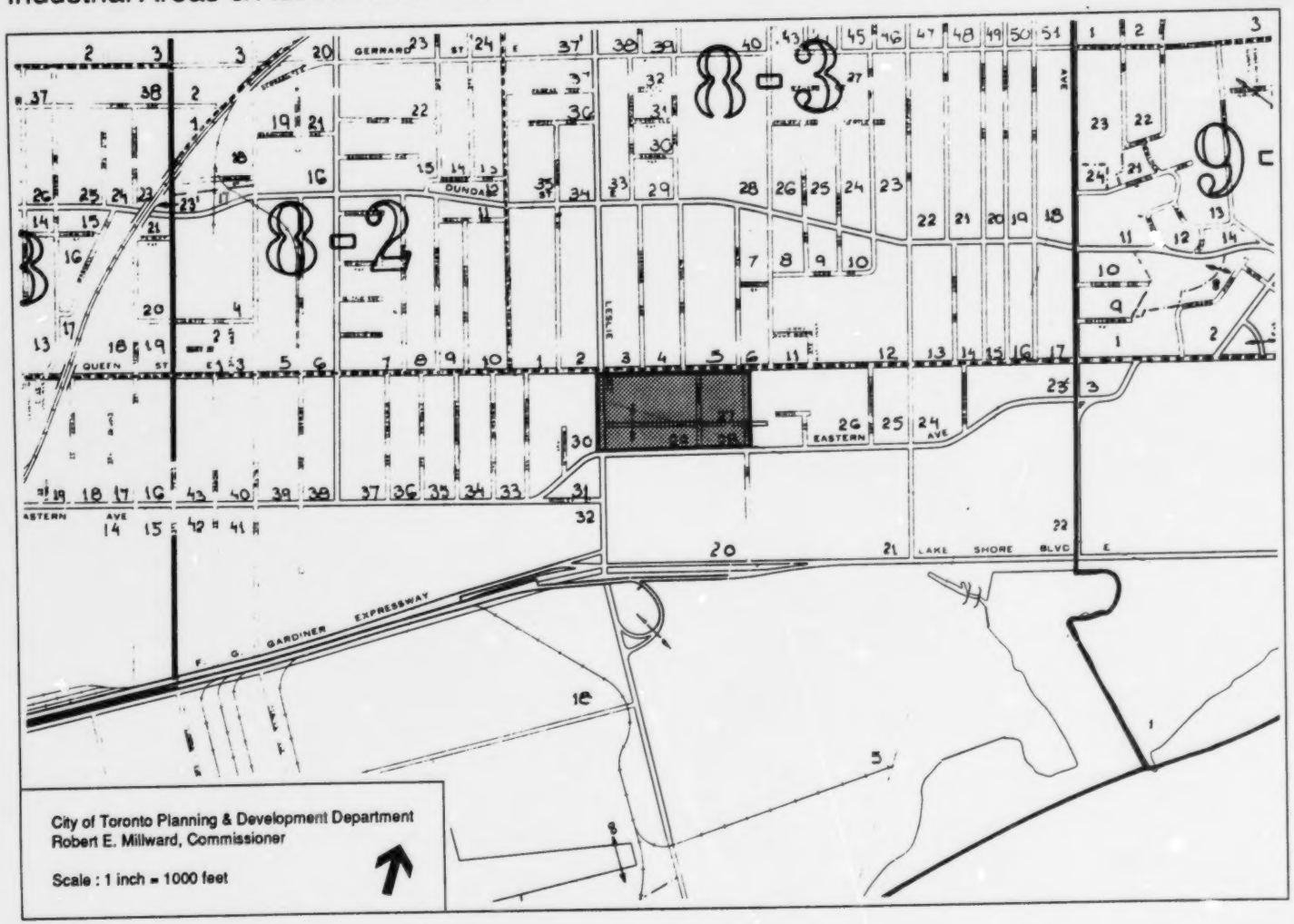


Number of Assessment Blocks	3
Acres	12.4
Number of Establishments	37
Total Employment	214
Industrial Employment	139
% Manufacturing	36
% Other Industrial	29
% Non-Industrial	35

Establishments with 100 Employees +	Address	Employment Range
----	----	----

Industrial Areas & Assessment Blocks

Leslie - Eastern **R**

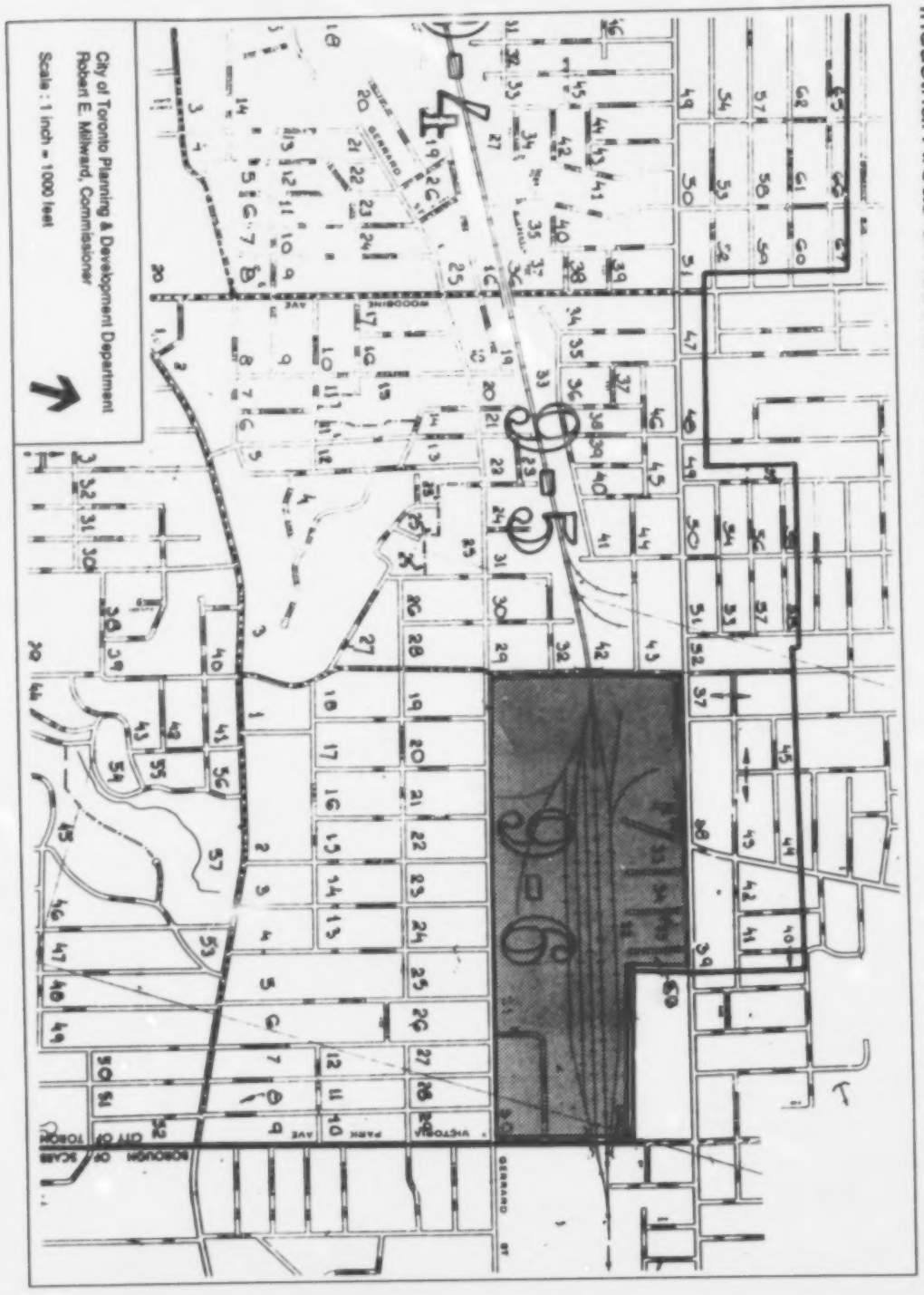


Area S Main-Gerrard

Zoning	Official Plan
I1 D2	Mixed Industrial-Residential Area
I2 D3	Restricted Industrial Area
C3 V2	Area of Industry

Number of Assessment Blocks	7
Acres	48.3
Number of Establishments	123
Total Employment	1181
Industrial Employment	299
% Manufacturing	15
% Other Industrial	10
% Non-Industrial	75

Establishments with 100 Employees +	Address	Employment Range
Bell Canada	2625 Danforth Ave.	100 - 250
Canadian Tire Corp.	2681 Danforth Ave.	100 - 250
Columbia Lumber Co. Ltd.	612 Victoria Pk. Ave.	100 - 250


Industrial Areas & Assessment Blocks
Main - Gerrard
S
City of Toronto Planning & Development Department
Robert E. Millward, Commissioner
Scale : 1 inch = 1000 feet
GERRARD ST
VICTORIA PARK AVE
BOROUGH OF SCARBOROUGH
CITY OF TORONTO

Appendix 2

Appendix 2 is comprised of the following tables.

Table A2.1	Employment by Industry for Canada and Ontario Annual Averages, 1976 and 1985, Labour Force Survey
Table A2.2	Employment Gains and Losses by Canadian Industry, 1974-1982
Table A2.3	Manufacturing Industry in Ontario, 1984
Table A2.4	Growth in Real G.D.P. in Canada and Ontario, 1974-1984
Table A2.5	Toronto C.M.A., Employment and Population as Percentage of Ontario's and Canada's, 1985
Table A2.6	Employment by Industry for the Toronto C.M.A., 1985
Table A2.7	Change in Employment by Industry, Metropolitan Toronto and Toronto C.M.A.
Table A2.8	Full-Time Employment in Metro, 1985
Table A2.9	Composition of Full-time Industrial Employment in Industrial Areas, 1985
Table A2.10	Composition of Land Use and Floor Space in Industrial Areas
Table A2.11	Composition of Developed Land in Industrial Areas in Metropolitan Toronto
Table A2.12	Industrial Land Inventory in the Toronto Region, 1961-1985
Table A2.13	Industrial Land Absorption in the Toronto Region, 1961-1985
Table A2.14	Industrial Floor Space Inventory in the Toronto Region, 1978-1986
Table A2.15	Change in Full-time Employment in Industrial Areas, 1981-1985
Table A2.16	Change in No. of Establishments, 1981-1985, in Metro's Industrial Areas.

Table A2.1

Employment by Industry for Canada and Ontario Annual Averages, 1976 and 1985, Labour Force Survey

	1976		1985		1976-85
Ontario	**Thousands**	**%**	**Thousands**	**%**	**% Change**
All Industries	3 643	100.0	4 402	100.0	20.8
Primary	169	4.6	182	4.1	7.6
Agriculture	112	3.0	127	2.9	13.4
Other Primary	57	1.6	55	1.2	-3.5
Secondary	1 139	31.2	1 238	28.1	8.7
Manufacturing	909	25.0	1 007	22.9	10.8
Construction	230	6.2	231	5.2	0.4
Service-Producing Industries	2 335	64.1	2 983	67.8	27.8
Transportation, Communication and Other Utilities	271	7.4	309	7.0	14.0
Trade (Wholesale and Retail)	610	16.7	761	17.3	24.8
Finance, Insurance & Real Estate	217	6.0	255	5.8	17.5
Community, Business & Personal Services	973	26.7	1 367	31.1	40.5
Public Administration	264	7.2	291	6.6	10.2
Canada					
All Industries	9 477	100.0	11 311	100.0	19.4
Primary	707	7.4	781	6.9	10.5
Agriculture	472	5.0	488	4.3	3.4
Other Primary	235	2.4	293	2.6	24.9
Secondary	2 556	27.0	2 568	22.7	4.7
Manufacturing	1 921	20.3	1 981	17.5	3.1
Construction	635	6.7	587	5.2	-7.6
Service-Producing Industries	6 215	65.6	7 963	70.4	28.1
Transportation, Communication and Other Utilities	824	8.7	884	7.8	7.2
Trade (Wholesale and Retail)	1 644	17.3	2 001	17.7	21.7
Finance, Insurance & Real Estate	496	5.2	629	5.6	26.7
Community, Business & Personal Services	2 573	27.1	3 648	32.1	41.8
Public Administration	678	7.2	802	7.1	18.3

Source: Statistics Canada, Labour Force Survey, Special Tabulation and Catalogue 71-001, February 1986.

Table A2.2

Employment Gains and Losses by Canadian Industry, 1974-1982
(Percentage of 1974 base employment)

	Gains	Losses	Net Change
Business services	207.7%	48.2%	159.4%
Social Services	117.6	27.4	90.2
Professional services	128.7	41.4	87.3
Amusement/recreation	115.0	40.9	74.1
Mining	94.1	42.6	52.6
Accommodation	97.1	45.0	52.0
Finance	93.5	43.9	49.6
Agriculture	83.6	39.1	44.5
Health services	54.6	10.7	44.0
Miscellaneous services	83.2	41.5	41.7
Transport	75.1	38.5	36.6
Trade	63.8	42.2	21.7
Forestry	69.4	50.1	19.2
Education	38.7	20.5	18.2
Construction	68.0	38.5	14.8
Manufacturing	48.4	41.1	7.3
Personal services	51.8	45.1	6.7
All industries	66.1	41.4	24.7

Source: Carmichael. Reorienting the Canadian Economy. Policy Review and Outlook, C.D. Howe Institute 1986. Based on data from department of Regional Industrial Expansion, A Study of Job Creation in Canada, 1974-82 (Ottawa, 1985).

Table A2.3

Manufacturing Industry in Ontario, 1984

	Gross Provincial Product		Employment	
	Per cent of Ont. Manufacturing Sector	Ont. as Per cent of Canada	Per cent of Ont. Manufacturing Sector	Ont. as Per cent of Canada
Food and Beverage	11.1	44.6	9.5	43.2
Tobacco	0.7	41.5	0.3	n/a
Rubber and Plastic	3.6	62.5	3.9	55.6
Leather	0.8	54.0	1.6	62.5
Textiles	2.8	50.6	3.3	50.0
Knitting Mills	0.3	28.0	6.8	n/a
Clothing	1.4	27.6	2.7	30.7
Wood	1.5	17.4	2.7	22.8
Furniture & Fixtures	1.9	55.6	3.1	46.6
Paper and Allied	5.4	33.6	5.1	36.6
Printing	5.1	50.7	6.2	49.7
Primary Metals	8.4	56.7	8.1	57.6
Metal Fabricating	8.4	59.1	10.3	6.38
Machinery	7.1	63.0	6.9	6.25
Transportation Equipment	13.3	77.5	12.4	72.1
Electrical Products	8.7	66.3	8.6	70.2
Non-Metallic Mineral Products	2.7	47.1	3.0	47.8
Petroleum Products	3.2	40.8	1.1	48.3
Chemical Products	8.9	59.5	5.4	52.6
Miscellaneous	3.9	64.3	4.7	59.1

Provided by Economic Policy Branch, Ontario Ministry of Treasury and Economics, 1986

Table A2.4

Growth in Real G.D.P. in Canada and Ontario 1974-1984

	Canada	Ontario
1974-79 annual avg.	3.2%	2.5%
1980	1.0	- .5
1981	3.4	2.6
1982	-4.4	-4.2
1983	3.3	5.5
1984	4.7	6.6

Source: Royal Commission..., op. cit., Vo.. 1, p. 133, and special table from Ministry of Treasury and Economics

Table A2.5

Toronto C.M.A. Employment and Population as Percentage of Ontario's and Canada's, 1985

	Ontario	Canada
Employment		
Manufacturing	41.8	21.5
Construction	42.8	18.0
Transportation, Communications and Utilities	40.6	13.8
Trade	46.4	19.0
Finance, Insurance and Real Estate	61.0	27.0
Community, Business and Personal Services	42.8	16.6
Goods Producing	40.8	19.2
Service Producing	42.9	16.6
Total	**42.3**	**17.3**
Population	35.1	12.5

Source: Statistics Canada Catalogues 72-002, 91-210, 91-211, 1985.

Table A2.6

Employment by Industry for the Toronto C.M.A., 1985

	Number of Employees	%
Manufacturing	367.3	23.5
Construction	70.2	4.5
Other	3.7	.2
Goods Producing Sector	441.2	28.2
Transportation, communications and other utilities	111.4	7.1
Trade	309.7	19.8
Finance, Insurance and Real Estate	151.5	9.7
Community, business & personal service	510.5	32.7
Other Services	38.3	2.5
Service Producing Sector	1 121.4	71.8
Total	**1 562.6**	**100.0**

Source: Statistics Canada Catalogue 72-002, 1985.

Table A2.7

Changes in Employment by Industry
Metropolitan Toronto and Toronto C.M.A.

	Metro	%	Toronto C.M.A.	%	Metro % of C.M.A.
1971					
All Industries	958 579	(100.0)	1 163 240	(100.0)	(82)
Primary Industries	3 860	(.4)	10 840	(.9)	(36)
Secondary Industries					
Manufacturing Industries	252 295	(26.3)	323 205	(27.8)	(78)
Construction	58 590	(6.1)	72 685	(6.2)	(81)
Service Industries					
Transport & Communications and Utilities	76 290	(8.0)	94 415	(8.1)	(81)
Trade	176 870	(18.5)	208 260	(17.9)	(85)
Finance, Insurance and Real Estate	78 925	(8.2)	84 595	(7.3)	(93)
Community, Business and Personal Services	254 105	(26.5)	294 790	(25.3)	(86)
Public Administration and Defence	57 635	(6.0)	64 840	(5.5)	(89)
1981					
All Industries	1 280 270	(100.0)	1 679 415	(100.0)	(76)
Primary Industries	5 910	(.5)	13 790	(.8)	(43)
Secondary Industries					
Manufacturing Industries	291 245	(22.7)	409 705	(24.4)	(71)
Construction	60 935	(4.8)	87 225	(5.2)	(70)
Service Industries					
Transport & Communications and Utilities	101 515	(7.9)	141 440	(8.4)	(72)
Trade	224 570	(17.5)	307 205	(18.3)	(73)
Finance, Insurance and Real Estate	129 285	(10.1)	144 715	(7.7)	(89)
Community, Business and Personal Services	392 945	(30.7)	487 655	(29.0)	(81)
Public Administration and Defence	73 865	(5.8)	87 680	(5.2)	(84)

Table A2.7 (continued)

	Metro	Toronto C.M.A.	Prop. Growth of C.M.A.
% Change 1971-81			
All Industries	(33.6)	(44.4)	(62)
Primary Industries	(53.1)	(27.2)	(69)
Secondary Industries			
Manufacturing Industries	(15.4)	(26.8)	(45)
Construction	(4.0)	(20.0)	(16)
Service Industries			
Transport & Communications and Utilities	(33.1)	(50.0)	(54)
Trade	(27.0)	(47.5)	(48)
Finance, Insurance and Real Estate	(63.8)	(71.1)	(80)
Community, Business and Personal Services	(54.6)	(65.5)	(72)
Public Administration and Defence	(28.2)	(35.2)	(71)

Table A2.8

Full Time Employment in Metro, 1985

	Industrial Areas	%	Total Metro	Industrial Areas as % of Total Metro
Industry	231 487	56%	262 848	88%
Office	114 523	28%	465 446	25%
Retail	55 082	13%	180 655	31%
Institutional	9 742	2%	109 167	9%
Recreational	1 520	0%	10 038	15%
Other	2 339	1%	6 408	37%
Total	**414 693**	**100%**	**1 034 562**	**40%**

Source: M.T.P.D.; E.I.A. 1985

Table A2.9

Composition of Full Time Industrial Employment in Industrial Areas, 1985

Product assembly	93 110	40.2%
Goods processing	82 965	35.8%
Other manufacturing	16 894	7.3%
Printing/Data Processing	14 317	6.2%
Warehouse	14 062	6.1%
Terminal/Trans.Communications	8 059	3.5%
Storage	2 080	.9%
Total	**231 487**	**100.0%**

Source: M.T.P.D., 1985.

Table A2.10

Composition of Land Use and Floor Sapce in Industrial Areas

	Hectares	%
Developed Land	7633	82
Vacant Land	1249	14
Open Space	350	4
Total	**9232**	**100%**

Source: M.T.P.D. E.L.A. 1985, Special Run 3.64

Table A2.11

Composition of Developed Land in Industrial Areas in Metropolitan Toronto

	% of Land	% Gross Floor Area
Industry	70.0%	68.0%
Office	11.9%	15.0%
Retail	10.8%	12.0%
Institution	2.9%	2.0%
Recreation	2.8%	1.0%
Other	1.6%	2.0%
Total	**100.0%**	**100.0%**

Source: M.T.P.D.; E.L.A. 1985, Special Run 3.64

Table A2.12

Industrial Land Inventory in the Toronto Region, 1986
(in hectares)

Municipality	Designated Industrial Land	% of Toronto Region	Vacant Industrial Land	% of Toronto Region
Metro Toronto*	9 232.0	27.6%	1 249.0	8.0%
Vaughan	2 197.5	6.6%	1 286.5	8.2%
Markham	1 434.7	4.3%	760.4	4.9%
Richmond Hill	536.2	1.6%	409.6	2.6%
York Region	4 168.4	12.5%	2 456.5	15.7%
Mississauga	7 649.2	22.9%	4 290.2	27.5%
Brampton	3 217.4	9.6%	1 881.8	12.1%
Peel Region	10 866.6	32.5%	6 172.0	39.6%
Burlington	2 026.3	6.1%	1 322.2	8.5%
Oakville	1 846.6	5.5%	855.1	5.5%
Halton Region	3 872.9	11.6%	2 177.3	14.0%
Durham Region **	5 297.7	15.8%	3 548.6	22.7%
Toronto Region	33 437.6	100.0%	15 603.4	100.0%

Source: Royal LePage

* M.T.P.D., E.L.A. 1985, Special Run 3.64

** Based on 1982 assessment records

Table A2.13

Industrial Land Absorption in the Toronto Region, 1961-1985 (in hectares)

	1961-1966**		1966-1971**		1971-1976**	
	hectares	% of Toronto Region	hectares	% of Toronto Region	hectares	% of Toronto Region
York Region	187	7.8%	475	17.4%	268	10.2%
Durham Region	54	2.3	96	3.5	247	9.3
Peel Region	784	32.8	1 025	37.7	1 282	48.5
Metro Toronto	1 367	57.1	1 126	41.4	847	32.0
Toronto Region	2 392	100.0%	2 722	100.0%	2 644	100.0%

	1976-1980*		1981-1985*	
	hectares	% of Toronto Region	hectares	% of Toronto Region
York Region	400	24.7%	720	33.5%
Durham Region	N/A	N/A	N/A	N/A
Peel Region	772	47.7	1 187	55.0
Metro Toronto	448	27.6	247	11.5
Toronto Region	1 620	100.0%	2 154	100.0%

N/A = Not available

Source: * *Royal LePage Commercial Real Estate Services*

** *A.E. LePage, Town of Richmond Hill Economic Development*

Table A2.14

Industrial Floor Space Inventory in the Toronto Region
(In square metres)

	1978		1982		1986	
Metro Toronto	22 760 600	71.4%	24 678 200	69.0%	26 864 900	64.6%
West Fringe	6 131 400	19.2	7 503 600	21.0	9 474 100	22.8
North Fringe	2 322 500	7.3	2 831 300	7.9	4 378 400	10.5
East Fringe	673 500	2.1	769 700	2.2	851 800	2.0
Total Fringe	9 127 400	28.6	11 104 600	31.0	14 704 300	35.4
Total Toronto Region	31 888 000	100.0%	35 782 800	100.0%	41 569 200	100.0%

Source: The Toronto Real Estate Board, Industrial, Commercial Investment Annual Report 1978-1986

Table A2.15

Change in Full Time Employment in Industrial Areas, 1981-1985

	1981	1985	Change
Industry	240 590	231 487	-9 103
Office	115 705	114 523	-1 182
Retail	51 210	55 082	3 872
Institutional	8 254	9 742	1 488
Recreational	1 556	1 520	-36
Other*	110	2 339	2 229
Total	**417 425**	**414 693**	**-2732**

* Includes construction, farming, fishing and resource extraction

Source: M.T.P.D., E.L.A. 1981, 1985 Special Run 3.65

Table A2.16

Change in Number of Establishments, 1981-1985, in Metro's Industrial Areas

	No.	As % of Net Growth
Goods processing	315	
Product assembly	202	
Printing/Data Processing	73	
Other manufacturing	87	
Terminal/Trans/Communication	-11	
Warehouse storage	54	
Total Industry	**720**	**20%**
Retail shopping	750	
Retail service	490	
Accommodation	5	
Total Retail	**1245**	**35%**
Industry Related Office	-254	
Finance/Insurance/Real Estate	78	
Business services	873	
Technical/Communication	124	
Trade/Personal services	488	
Health/Associations	141	
Government	30	
Total Office	**1480**	**41%**
Institutions	44	1%
Recreation	1	0
Other	99	3
Total	**3589**	**100%**

Source: M.T.P.D.;E.L.A. 1985, Special Run 3.65